

**University of California Libraries**  
**Master Planning Project List**  
Updated August 3, 2004

This table tracks projects related to strategic planning, and is not a comprehensive list of all library projects. For information about ongoing CDL projects, programs and services, see <http://www.cdlib.org/inside/projects/>.

Project	Responsibility	Timeline	Nature of Work	Actions Taken	Links
<b>General Items</b>					
<b>Key documents:</b> <ul style="list-style-type: none"> <li>o New models of library service: deep resource sharing and collaboration at the University of California (<a href="http://www.slp.ucop.edu/documents/newmodelsoflibraryservice4-17-03.pdf">http://www.slp.ucop.edu/documents/newmodelsoflibraryservice4-17-03.pdf</a>)</li> </ul>					
Systemwide Strategic Directions for Libraries and Scholarly Information, with introductions for constituents: <ul style="list-style-type: none"> <li>▪ Perspectives on State Financing Issues</li> <li>▪ Perspectives on Budgeting Issues</li> <li>▪ Faculty Perspectives</li> </ul>	SLP	Plan completed in April 2004	Requested by SLASAC 4/29/03; document that captures the evolving strategic direction and budgetary issues for libraries and scholarly information	Reviewed by ULs and UCOL 2/10-11/04 Reviewed by SLASAC 2/20/04 Submitted to Provost and Sr.VP for Academic Affairs 6/1/04	<a href="http://libraries.universityofcalifornia.edu/planning/">http://libraries.universityofcalifornia.edu/planning/</a>
<b>Collection Management and Coordination:</b> <i>Broader planning strategies that comprehend a variety of collaborative collection development and management activities. Specific examples discussed by the University Librarians include, in addition to shared collections, digitization activities and last copy policies, as well as continued improvement/expansion of resource sharing programs.</i>					
<b>Key documents:</b> <ul style="list-style-type: none"> <li>o Collection Management and Coordination Paper drafted by CMPG-SC (<a href="http://libraries.universityofcalifornia.edu/sopag/cmpg_collection_strategy.doc">http://libraries.universityofcalifornia.edu/sopag/cmpg_collection_strategy.doc</a>)</li> <li>o Shared Collections Paper drafted by CMPG-SC (<a href="http://libraries.universityofcalifornia.edu/sopag/cmpg_develop_shared.doc">http://libraries.universityofcalifornia.edu/sopag/cmpg_develop_shared.doc</a>),</li> <li>o Building a Unified Government Publications Repository (final report of the SOPAG Task Force on Government Information): <a href="http://libraries.universityofcalifornia.edu/sopag/govinfo/govpubsTF7.pdf">http://libraries.universityofcalifornia.edu/sopag/govinfo/govpubsTF7.pdf</a></li> <li>o Task Force on Government Information Final Report memo from SOPAG to ULs (Sept. 16, 2003): <a href="http://libraries.universityofcalifornia.edu/sopag/govinfo/finrept_memo.html">http://libraries.universityofcalifornia.edu/sopag/govinfo/finrept_memo.html</a></li> </ul>					
Strategies for implementing the Shared Print Archive of journals (e.g. Elsevier and ACM collections)	SOPAG, SLP (Director of Shared Print)	Ongoing	Action undertaken initially in response to a recommendation by CDC, and subsequently to implement recommendations of <i>Systemwide Strategic Directions</i> . Procedures for establishing a shared print archive for print copies received as part of UC's electronic subscriptions.	CDC charged an Elsevier/ACM Assessment Team to evaluate the feasibility of using this model for additional collections. Assessment Team submitted report March 2004.  SOPAG approved processing of additional collections using Elsevier/ACM model.  CDL will develop funding models for continuation of the project on a permanent basis for additional discussion (5/04)	See SOPAG October 2002 minutes: <a href="http://libraries.universityofcalifornia.edu/sopag/min102502.html">http://libraries.universityofcalifornia.edu/sopag/min102502.html</a>  Assessment Team report: <a href="http://libraries.universityofcalifornia.edu/cdc/elsevier_acm_assessment.doc">http://libraries.universityofcalifornia.edu/cdc/elsevier_acm_assessment.doc</a>  SOPAG May 2004 minutes: <a href="http://libraries.universityofcalifornia.edu/sopag/min050604.doc">http://libraries.universityofcalifornia.edu/sopag/min050604.doc</a>
Steering Committee on Implementing Shared Collections of Government Information	SOPAG	On hold	Established as a result of the Government Information Task Force Report	Identify and implement a pilot project of limited scope with a small number of representative government titles. Consult widely.  Titles identified in mid-April, 2004. At UL/SOPAG meeting in May 2004, it was decided to place the pilot project on hold until other discussions could be held.	Charge: <a href="http://libraries.universityofcalifornia.edu/sopag/steering_charge.html">http://libraries.universityofcalifornia.edu/sopag/steering_charge.html</a>  Joint University Librarians/SOPAG May 2004 minutes: <a href="http://libraries.universityofcalifornia.edu/sopag/ULsopagmin050704.doc">http://libraries.universityofcalifornia.edu/sopag/ULsopagmin050704.doc</a> (last item)

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Task Force on Visual Resources	SOPAG	Ongoing		Report received August 2003 and tabled until other discussion were completed.  Discussion resumed March 2003. Discussion to be held with CDL on how the various image database are related to each other both architecturally and functionally to determine next steps for SOPAG.	Final Report: <a href="http://libraries.universityofcalifornia.edu/sopag/vrtf/">http://libraries.universityofcalifornia.edu/sopag/vrtf/</a>
JSTOR print repository	SLP	June 2004	Discussions underway with JSTOR to become a print repository.	Discussions, letters of interest sent. Proposal development underway Jan-September 2004. Launch of two-year project to process initial collection anticipated in January 2005.	
<p><b>Shared Services:</b> Coordinated strategy for development of shared services, complementing shared collection strategies. Specific examples include services in support of undergraduate instruction, the collaborative development of user tutorials and training programs, and the ongoing efforts development of Request and Desktop Delivery (Resource Sharing Committee), and Access Integration (SOPAG).</p> <p><b>Key documents:</b></p> <ul style="list-style-type: none"> <li>o A framework for planning shared library services (May 12, 2003) (<a href="http://www.slp.ucop.edu/documents/layeredservicemodel_may2003.pdf">http://www.slp.ucop.edu/documents/layeredservicemodel_may2003.pdf</a>)</li> </ul>					
Strategic planning for shared services	ULS, SLP	Ongoing	Develop a programmatic framework and plan of action to leverage the resources of the UC libraries.  Develop and implement pilot programs to test concepts, refine planning, establish and revise priorities, and clarify resource needs and sources.		
Shared Bibliographic Services	SOPAG, CDL	Ongoing	Identify and prioritize shared services that create, manipulate, exchange, and share bibliographic data to enhance resource management, discovery, and use.	Shared cataloging program est. 02/00; Request initiated in 1999; Consortial Borrowing System from VDX implemented 2003-04; SFX server installed 2002, extend to campus-licensed resources co-funded, hosted by CDL 9/03; Melvyl union catalog migration in 2003; prioritization principles drafted by SOPAG 10/03.	
Electronic Resources Management System Task Force	SOPAG	Report due July 2004	Established as a result of the ERM Planning meeting held March 2004 to address identified system needs.  Develop definition of immediate needs and prioritize; develop high-level functional specifications; test specifications against available options; deliver an analysis of the options and recommendation of next steps.	Systemwide ERM Planning meeting held March 2004.	ERM Planning meeting final report: <a href="http://libraries.universityofcalifornia.edu/sopag/ermfinal.htm">http://libraries.universityofcalifornia.edu/sopag/ermfinal.htm</a>  Charge: <a href="http://libraries.universityofcalifornia.edu/sopag/ERMSTaskGroupCharge.final.doc">http://libraries.universityofcalifornia.edu/sopag/ERMSTaskGroupCharge.final.doc</a>

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Technical integration of digital libraries	SLP	Ongoing	Integrate digital library content / services with instructional technologies by participating in and monitoring work of Information Technology Infrastructure Task Force and other groups as necessary.	Discussed at SLASAC meeting, 2/28/03	
<p><b>Shared Facilities:</b> Examination of the roles and capacities of the RLFs and other shared facilities in support of shared collection strategies, and new program initiatives. Includes governance and management (including consideration of consolidated governance under a single Systemwide board), the use of the RLFs to assist the campuses in collections and facilities management, and contingency planning in the event that growth of RLFs is curtailed after SRLF Phase III.</p>					
Review of governance, organization, funding, new roles for RLFs	ULs, Shared Library Facilities Board	Ongoing	Progress report to SLASAC 2/03	RLF Task Force report completed Feb. 2004. Statement on Persistent Deposits in UC Regional Library Facilities completed May 6, 2004.  Moving forward to appoint new Shared Library Facilities Board	RLF PLanningTask Force final report <a href="http://www.slp.ucop.edu/documents/RLF-TF_Final_Report.pdf">http://www.slp.ucop.edu/documents/RLF-TF_Final_Report.pdf</a>  Statement on Persistent Deposits: <a href="http://libraries.universityofcalifornia.edu/planning/RLF_Persistence_Policy.pdf">http://libraries.universityofcalifornia.edu/planning/RLF_Persistence_Policy.pdf</a>  Both documents can be accessed from: <a href="http://libraries.universityofcalifornia.edu/planning/-_sharedfac">http://libraries.universityofcalifornia.edu/planning/-_sharedfac</a>
<p><b>Scholarly Communication:</b> Promoting constructive change in scholarly communication through support of scholar-led experimentation, provision of infrastructure for new methods of scholarly communication, and education of faculty.</p> <p><b>Key documents:</b></p> <ul style="list-style-type: none"> <li>o Report from the scholarly communication faculty seminars (Oct. 31 and Nov. 7, 2003) <a href="http://libraries.universityofcalifornia.edu/scholarly/fall_03_facultyforums.html">http://libraries.universityofcalifornia.edu/scholarly/fall_03_facultyforums.html</a></li> </ul>					
Strategic planning for scholarly communication	Office of Scholarly Communication	Ongoing	Work collaboratively with faculty, management, the UC Press, information schools, and national associations and bodies, to develop and implement a program to comprehensively alter the scholarly communication process so that it is economically sustainable and ensures the widest possible access to the scholarly record.	Office of Scholarly Communication established [check with JLO as to date]	<a href="http://libraries.universityofcalifornia.edu/scholarly/">http://libraries.universityofcalifornia.edu/scholarly/</a>
<p><b>Digital Preservation:</b> Develop a central digital preservation infrastructure that encompasses digital information in which there is common interest as well as assets that are of unique interest to campus libraries. Coordinate closely with University units responsible for information technology, records management, and others with interest in and responsibility for preservation of digital content, at Universitywide and campus levels, to foster development and financial and technical support for a robust common information technology infrastructure that can meet the University's diverse needs for reliable archiving, management and retrieval of essential digital information of all kinds.</p>					
Digital Preservation Repository			Identify methods to preserve and persistently manage ejournals, evaluate methods for gathering and persistently managing web-based materials, establish a digital preservation repository	UC Digital Preservation Program established	<a href="http://www.cdlib.org/programs/digital_preservation.html">http://www.cdlib.org/programs/digital_preservation.html</a>