University of California Libraries
Systemwide Annual Plan and Priorities

2016-2017

Version: 7/22/16

New Projects	Ongoing Projects	Completed Projects
1. Libraries Alignment Framework	1. Shared Services Model	1. UC Libraries Digital Collection Project
	2. Federal Documents Archive Project	2. Future Role of Librarians
	3. Decision Matrix	
	4. Long-Term Access to Digital Content	
	5. Next Gen Library Management Systems	
	6. Shared Space Needs for Physical Collections	
	7. Support And Advocacy for Open Access	
	8. Advance Research Cyberinfrastructure	

New Projects for FY 16/17

1. **Libraries Alignment Framework**
    Develop a new framework for alignment among the ten campus libraries and CDL. This framework is informed by the funding realities within which the University of California operates.

    Relevant Long-Term Goal(s):
    (1) Enrich the systemwide library collection.
    (4) Optimize and develop shared services for operational efficiency and maximal expertise.
    (6) Build and leverage expertise.

    Group(s): CoUL, DOC, others TBD

    Near Term Goal(s):
    -   CoUL will draft a whitepaper on the *Future of the UC Libraries* for President Napolitano;
    -   With new leadership across much of the UC Libraries, CoUL will clarify and realign the roles and relationships of CDL and the ten campus libraries.

Ongoing Projects from FY 15/16

1. **Shared Services Model**
    Identify areas where shared services, expertise, and resources will have significant benefits to library users and achieve greater efficiencies. Examine and identify shared positions and staffing models that support these shared services. This is broader than Technical Services, encompassing all library activities.

    Relevant Long-Term Goal(s):
    (4) Optimize and develop shared services for operational efficiency and maximal expertise.

    Group(s): CoUL; DOC, others TBD

    Near Term Goal(s):
    -   Create an inventory of specialized services at ten campuses & CDL;
    -   Develop a model shared standards agreement to facilitate the sharing of data among the UC Libraries. For example, a desired outcome of a shared ILS for NRLF and SRLF is reduced workloads throughout the system. To most fully reduce these workloads, the UC Libraries would develop common metadata standard for all data submitted to RLFs so that data can be ingested without additional manipulation.

    -   Develop a model for assessing shared services.

- Develop a five-year roadmap for positions and services that could be shared as well as any centers of excellence that could be established on campuses, at CDL, or at the RLFs;

2. **Federal Documents Archive Project**
Implement the creation of a shared digital and print archive of U.S. Federal Documents held by the UC System.

Relevant Long-Term Goal(s):
(1) Enrich the systemwide library collection.

Group(s): FedDocArc Implementation Oversight

Near Term Goal(s):
- The UC Federal Documents Archive Project will continue creation of a shared print and digital archive of US Federal Documents held by the UC System, including confirmation of a method for disclosures, completion of identification and disclosure of items currently shelved at the RLFs, confirmation of process for reviewing and handling items currently shelved at an individual UC campus (e.g. UCR), and an initial analysis of progress made and resources needed to continue the project into the next phase.

3. **Decision Matrix**
The Decision Matrix will be used to evaluate the potential of proposed systemwide endeavors and to decide which systemwide endeavors will be pursed.

Relevant Long-Term Goal(s):
(4) Optimize and develop shared services for operational efficiency and maximal expertise.

Group(s): DOC

Near Term Goal(s):
- DOC will finalize the draft Decision Matrix document and begin using it to evaluate proposed systemwide initiatives and projects;
- By July 2017, DOC will provide an assessment of the Decision Matrix as a management tool.

4. **Long-Term Access to Digital Content**
Play a leadership role in the development of regional, national, and international digital library programs and services — such as the Digital Preservation Network (DPN), HathiTrust, arXiv, and SHARE — to ensure that the cultural and scholarly record is preserved and accessible.

Relevant Long-Term Goal(s):
(1) Enrich the systemwide library collection;
(3) Maximize discovery of and access to information resources.

Group(s): CoUL

Near Term Goal(s):CDL will work with campus customers to chart future directions for Merritt and the Systemwide Digital Assets Management System (DAMS).

5. **Next Gen Library Management Systems**
   Investigate the challenges and benefits of next-generation library management systems and the concept and benefits of a shared or common library management ecosystem, particularly as it supports shared services like the Regional Library Facilities.

   Relevant Long-Term Goal(s):
   (4) Optimize and develop shared services for operational efficiency and maximal expertise.

   Group(s): CoUL, SCLG, SRLB, RLF ILS Design and Implementation Team (RLFILSDIT)

   Near Term Goal(s):
   - Move forward on plan to use Voyager as a shared LMS for the two RLFs.

6. **Shared Space Needs for Physical Collections**
   Analyze and explore shared space needs for physical collections and a strategy for expanding capacity of the Regional Library Facilities. Maximize shelf space across the campuses and at the RLFs by reducing unnecessary duplication among UC library collections, analyzing the cost benefit of de‐duplicating the holdings of the RLFs through pilot projects, and continuing to pursue effective shared print projects and strategies.

   Relevant Long-Term Goal(s):
   (4) Optimize and develop shared services for operational efficiency and maximal expertise.

   Group(s): SCLG, SLFB, FedDocArc Team, Shared Print Teams

   Near Term Goal(s):
   - Re-evaluate criteria for RLF deposit;
   - Commission an engineering study for expanding NRLF and develop a proposal for NRLF 4 based on the results of that study;
   - Develop alternative plans if systemwide funding for NRLF 4 cannot be secured.

7. **Support and Advocacy for Open Access**
   The UC Libraries will develop a general approach to both the OA 2020 Initiative for the Large-Scale Transition to Open Access as well as open access policy more broadly.

   Relevant Long-Term Goal(s):
   (5) Expand engagement in scholarly communication.

   Group(s): CoUL, SCLG

   Near Term Goal(s):
   - Provide advocacy and support for open access initiatives (e.g., the UC Academic Senate OA Policy; UC Presidential OA Policy; OSTP OA mandate; OA2020, etc.)

8. **Advance Research Cyberinfrastructure**
   Building on the VCR-CIO initiative and the Cyberinfrastructure Alliance concept, define direction for partnerships and collaboration for library cyberinfrastructure.

Relevant Long-Term Goal(s):
(2) Capitalize on opportunities to accelerate transition to a primarily digital environment.
(3) Maximize discovery of and access to information resources.

Group(s): CoUL, DOC

Near Term Goal(s):
- Evaluate the potential of SHARE participation as a systemwide initiative;
- In consultation with systemwide VCRs and CIOs, draft a whitepaper that defines a new direction for collaboration on UC research cyberinfrastructure;

Completed/Terminated Projects from FY 15/16

1. **UC Libraries Digital Collection Project**
   The report from this project will be posted by fall of 2016.

2. **Future Role of Librarians**
   Completed with the revision of APM-360.

Future Priorities

1. Assist and support faculty as they explore and use alternatives to traditional methods of scholarly publishing. (Goal 5)
   a. Explore funding models to support alternative publishing strategies that provide economically sustainable open access.
   b. Ensure that the infrastructure to support use of alternative modes of publishing (including perpetual access) is in place.
2. Examine the support for open education resources at our campuses and consider implications for libraries at either the systemwide, regional, or national level. (Goals 3, 5)
3. Leverage our collective expertise in utilizing linked data to enhance access to scholarly information resources. (Goal 1, 3)