

## Shared Content Leadership Group

Meeting Minutes, October 24, 2016

### In Person Meeting at CDL Offices, Oakland

**Present:** Martha Hruska (SD, chair), JoAnne Newyear-Ramirez (B), Myra Appel (D), John Renaud (I), Sharon Farb (LA), Jim Dooley (M), Alison Scott, R, Eunice Schroeder (SB), Julia Kochi (SF), Kerry Scott (SC), Becky Imamoto (LAUC), Ivy Anderson (CDL)

**Guests:** Gunter Waibel (UC AVP/CDL Executive Director), Emily Stambaugh (CDL), Mihoko Hosoi (CDL), Wendy Parfrey (CDL), Jackie Wilson (CDL), Chan Li (CDL)

### Welcome and Introductions

*UC library collections comprise the largest academic library in the world and contribute significantly to the world's record of scholarship and its cultural and historical record. Taking the definition of the UC Library Collection in "[The University Library Collection: Content for the 21st Century and Beyond](#)" (2009) as a starting point, what is your vision for the inter-relationship among the UC library collections and how we might best realize the advantages of UC library collections as a system that goes beyond shared print and licensed resources (curating social media, web archives, data, locally digitized collections, preservation reformatting, open access)? What should we be investing resources (time, people, money) in together to realize that vision, and why?*

### Round Robin – Collection Priorities

**UCB:** some selectors are concerned about local vs. systemwide needs but this might be a communication issue; can CDL help with vendor contracts (book jobbers, serials agents, etc) to get costs down and sign contracts.

**UCD:** new Data Services department that will handle institutional assets including faculty research data and papers; this is a new vision just getting off the ground; shared digitization is an interest; there is a project that covers viticulture/enology working with donors of content (e.g., wine labels).

**UCI:** recruiting for new metadata librarian for Digital Scholarship Services, also a data curation position; growing healthcare/medical programs are a collection area that the general library is trying to secure funding to support fully, possibly systemwide collaboration; digitization of special collections and systemwide sharing is of interest.

**UCLA:** likes SCLG vision but gaps include building on Tier 1, Tier 2 success, model license, ADA compliance and copyright reform; need to improve discoverability for web archive projects with

better finding aids; working with SRLF on local digitization projects with a set of criteria; need to find common ground on OA approaches.

**Merced:** campus budget is tied up with 2020 plan and capital expenditures to build out capacity; makes it difficult for library to participate in systemwide license opportunities; some local digitization and web archiving projects - have high end technology and equipment for digitization but no dedicated staff.

**UCR:** largest FTE enrollment in entire UC system (23,000 undergrads); no new money for library in last 5 years but UL is asking for funding for special projects; new campus budgeting model defines library as an expense; new GIS librarian with grant opportunities.

**UCSD:** increase to collections funding last fiscal year, modest increase based on CPI this year; goal is to look at digitization projects strategically and target certain areas; need better access to metadata and finding aids for digital assets; collaboration is important for web archiving but funding and campus recharge infrastructure is not built yet; linked data at San Diego is an issue; need a systemwide inventory of special collections and ability to tap expertise of CKG groups (archivists, metadata) for projects as needed.

**UCSF:** waiting to hire UL; budget is dire due to 3-year phase-in Science Direct cost increase; access is a big issue, UC eLinks isn't intuitive, will pilot Summon next year; Tier 2 support is an ongoing problem in clinical/health resources; affiliated hospitals are granted access via the IT department by department request (not library); one-year contract for data archivist and working on data science initiative focused on education.

**UCSB:** recruiting new AUL for collections and content strategies; new library wing costs \$800k/yr out of library budget; there is a Collaboratory in the new wing for software and statistical analysis (dedicated station); there was an increase in collections budget this year for the first time in ten years but still can't add new Tier 1 or local ongoing resources; white paper shows a \$2M loss of purchasing power; set up data curation program to provide consultation to faculty; planning to preserve ETDs and historical sound/audio or maps; IMLS grant to explore digital collections (Thomas Padilla); dedicated fund in collections for crimson hexagon.

**UCSC:** hiring new head of research services for more faculty and student outreach; shared services for digitization is of interest especially because rights clearance is time consuming and expensive at the local level and subject expertise may be on other campuses; recent weeding of the Science and Engineering collections resulted in a 60% decrease of physical print (most books went to JSTOR) with little faculty pushback; a local digitization team is working on strategy now.

**CDL:** 5% permanent cut to CDL budget but not licensed collections; working on proposal for President Napolitano to significantly increase central funding for ongoing Tier 1 subscriptions to offset campus budget issues; peer comparison project will inform the funding request and

provide background for February 2017 meeting; need more discussion about OA offset approaches.

## White Board Notes - during morning session

### Opportunities for collaborations:

- Making things available systemwide
- Web archiving
- Linked data
- Special collections (CKG, sharing profiles)
- Tools that extract information, discovery
- OCLC charges and other contracts (Book jobbers, etc)
- Health science resources
- Data curation
- Shared digitization, shared expertise?
  - E.g. Merced with rich equipment but limited staff resources
- Enhanced licenses (TDM, ADA, vision repaired)
- New ETD group (opportunity for shared service?)
- Collections as data (UCSB example)
- OA, collaborative opportunities, e.g. knowledge unlatched
- Rights clearing (re special collections)
- Subject and language expertise sharing
- Proposal for the president
  - Increase funding, AV, etc

### Positives, potential & ideas

- CDL funding for ongoing resources
- Comparing UC collections vs peers
  - Use results for future funding discussions
- Proposal for OP, increase funding, AV, etc
- Overlapping licenses

### Challenges

- Campus vs systemwide: communication, funding, staffing
- No budget increase
  - M,R, LA, SD (CPI based increase), SB, CDL, D
- Digitization
  - Vendors prefer dealing with campuses vs systemwide
- Archiving
  - Storage
  - Cost (not only UC)

- Discovery & access
  - UC elinks
- Tier 2 support needed
  - Limited Resource Liaisons affiliates
  - Funding
  - Security
  - Not library issue, bigger discussion needed
  - Not much discretionary funding
- OA
  - Diverse perspective needed
  - Common grounds?
  - Limited resources to contribute
  - Opportunities for collaboration, e.g. Knowledge Unlatched

### Lunch Discussion with Gunter Waibel – Small scale digitization pilots

Gunter described his past experiences at Smithsonian Institution on digitization projects. The strategy there was to start a small project, \$10,000, which was easy to contract. After a week of pilot, staff was confident about what it would cost and how fast they can move forward. Then, different prototypes were developed. The disciplinary approach has created momentum. At the end of the process, half of the museum was digitized.

Questions and implications for UC:

- How can we translate the Smithsonian experiences here within UC?
- Is UC interested in prototype approach? We can try one or two projects
- We can try to standardize certain measures and metrics, progress of rate, digitization cost, etc
- Cost calculator: how can we optimize the equipment and other resources we have among UCs
  - The cost calculator depends on various factors, size, stability, etc. It was not a precise tool, but it was close and meaningful
  - For Smithsonian project, the cost calculator does not include associated metadata. We need to define what part of digitization is. Drawing the boundaries is important
  - Initial seed funding
    - For Smithsonian project, it came from the office. Everyone has to contribute and it was made clear on the documents
    - How can we do things more efficiently when are all doing the digitization projects locally, which might be inefficient
      - One of the reasons that Smithsonian project has been successful is that they hired contractors to digitize things by scale. Individual museum still can keep digitizing high end stuff, but the contractor has been helping with catching up things

- Role of CDL if we engage this type of project
- CDL could play a role of project manager. Survey all of the digital projects and then can be pushed back to campuses

## Coalesce around Vision – Principles and Key Themes

### Digitization

- Shared: how collaborate? How focus?
- Collectively
  - Articulate vision + action plan
    - showcase UC's collections, make shareable
    - Contribute to public good, accessible
  - Priorities
    - Archival? Or high impact?
  - Contribute to public good , access VS commercial options
  - Preservation
  - Funding

### Collection /Content Assessment

- Tier 2 assessment
- Collection strengths
- Overall peer comparison
- What things campuses are doing now individually and what things we can do systemwide
  - Some campuses have started print approach plan because of inconsistent needs
  - UCLA in investing in the tradition areas, e.g. English, history, etc
  - Do we need multiple copies? We need assessment to determine that
  - ILL analysis
  - Assessment tool: Greenglass
    - UCD is interested in the tool. It is only used to compare the book holdings, not the journals

### Web archiving

- Tools, like Kudos, collection related tools
- Collection as data
- Best practices/documentation
- How to treat blogs/social media
- Vision:
  - Collection as data
  - Collection as services
  - Collection based tools to support new forms of scholarship

- Open, shareable to make UC research openly accessible as public good

#### Budget strategies

- How to support?
- What should we not support
- Access VS Ownership
  - Just in time VS just in case
  - How different libraries play as a group

#### Shared expertise

- Subjects
- Equipment
- Staffing
  - B, LA, D have copyright librarians. We can do more together because we have more copyright expertise
  - Collections
  - Contracts
  - Service contracts

#### OA

- vision: make UC research openly accessible as public good
- crowdsource: create pool for projects

#### Identify Priority Collaborative Actions – beyond shared print and licensing

#### OA

- Knowledge Unlatched is supported by all the campuses
- Campuses have different views on offsetting deals, especially when APC is part of it.
  - Springer wants to see more revenue from offsetting deal. CDL has pushed back and is waiting for their response
  - Start with small publisher
  - Identify the principles and also the differences among campuses
  - Will have discussion on OA in December. SCLG members need to put their views/position on wiki

#### Digitization

- Seed funding
- Pilots: CDL funding and coordination
- Large project: AV

- Pooling expertise
- Open education resources
- Sharing metadata

### Shared Print Strategy Team

How does DOC response inform how communications and importantly, decisions, will be made in timely and effective way? How does SCLG want to respond?

Emily will do the quarterly reports to both SCLG and DOC and will join SCLG meetings regularly for the next few months

- For the HathiTrust shared project, Emily will need the feedback from the phase 1 participating campuses and will consult with SCLG group as well
- Martha will forward Emily's survey to SCLG asking about shared print for licensed content going forward. Each member will fill out the survey by Nov. 4 and Emily will discuss the collated results at the Nov. 18 meeting with the group
- Shared print retrospective monograph programs
  - Participate in the HathiTrust shared print project
  - Test certain hypotheses about how many copies do we need
    - What happened if the copies are damaged? It need to include checking the items periodically
    - Are dark archive copies necessary?

### Wrap-up and Next Steps

#### Upcoming meetings:

- Nov 18: Shared Print topic to discuss the collated responses from the survey
- Dec 9th
- Dec 16th
- Starting in January, it will only be 1.5 hour long. Will switch to Zoom
- Will invite CKG chairs to the relevant meetings