**RLF Configuration Task Force (RCTF) charge**

The RLFs hold a significant portion of the physical collections of the UC Libraries. Over 400 monographs and journal articles are delivered to patrons every day from the RLFs. Understanding how the fourteen million items in the RLF collection should best be managed in the upcoming systemwide ILS (SILS) will need to be determined early in the implementation process to ensure a smooth transition when the UC libraries go live with the new SILS. In order to make the Alma go live date, the records for the RLFs will most likely end up remaining affiliated with UCLA and UCB though a recommendation that changes this direction may be the outcome of this team.

To investigate the best way to configure RLF materials in the upcoming SILS, an RLF Configuration Task Force (RCTF) will carry out an analysis and make recommendations to the SILS Working Group.

**Charge**

The RCTF will:

1. Broadly investigate how RLF collection records are managed in the upcoming SILS environment:
   a. Keeping in mind these three possible approaches:
      i. Bibs, HLDG and item records are managed in the host campus Institution Zone (IZ)
      ii. Bib, HLDG and item records are managed in an RLF-only IZ
      iii. Bib, HLDG and item records are managed in the IZ of the original depositing library
   b. And keeping in mind key elements of RLF context:
      i. Single copy policy
      ii. Persistence Policy
      iii. New inventory management system being implemented Spring of 2020
2. Conduct informal interviews with like consortia using Alma and an off site facility with deposits from multiple members that circulate to all members
3. Create a series of questions for campuses re: their expectations for RLF functionality in a SILS in areas including statistics, discovery, holdings maintenance, ease of duplicate checking, resource sharing, etc
4. In consultation with stakeholders, understand work required to support the different approaches
5. Guided by interview results, timelines and survey results, and informed by overall SILS implementation discussions, issue a recommendation for RLF configuration which may be phased.
6. Make a recommendation to the SILS WG regarding how to manage campus records that duplicate RLF records
7. Determine any other RLF-related issues that need to be discussed and determined related to RLF records in a SILS environment, including but not limited to:
   a. Holdings statements consolidation
   b. Who is responsible for low level records? Or general record upgrading?
c. What decisions need to be made now to support a more efficient and streamlined RLF implementation?
d. Statistics

**Deliverable**
- Final report and recommendations, to be completed by the end of phase 4

**Functional expertise needed for members**
- RLF management
- Cataloging
- Access Services
- Information Technology
- Operations

**Other membership considerations**
- Multiple staff from Alma campuses
- Depositors from non-host campus
- Northern and Southern coverage

**Members**
- Cathy Martyniak (Co-Chair)
- Lynne Grigsby (Co-Chair)
- Sarah Koller (Davis, Operations, Alma)
- Linda Michelle Weinberger (Irvine, ILL, Alma)
- Anna Striker (CDL)
- Vacant (Cataloging)
- David Eifler (UCB Curator) Pending

**Timeline and commitment**
- Commence work in January 2020
- Complete work by the end of Phase 4
- Bi-weekly meetings
- Average weekly time commitment of 2 to 3 hours for members (more for co-chairs)

**Reporting line and communication**
- Reports to the SILS WG
- Consults with RLF staff and leadership; the Shared Library Facilities Board (SLFB); Campuses and CDL (Implementation Coordinators) as necessary; Ex Libris via the SILS Product Manager
- Communication technology: SLACK, Confluence, Google Drive