

February 14, 2012

To: ACG Chairs

From: SOPAG, via Diane Bisom, Chair

Re: SPiPTF Final Report and Follow-up Actions for CDC, HOPS/RSC, and NGTS Management Team

The report of the Shared Print in Place Task Force is attached for your information. The report and recommendations have been endorsed by SOPAG and the CoUL. Please note that follow-up on several of the recommendations is directed toward specific ACGs (see Table 1). Please review the sections for your ACG (below) and let me know if you have any questions. SOPAG acknowledges that a number of the recommendations are already underway or have been subsumed by other activities – given that; SOPAG would appreciate progress reports from CDC, HOPS/RSC, and NGTSMT in June 2012, with occasional progress reports thereafter.

## **CDC**

The Shared Print in Place Task Force (SPIPTF) Report recommendations as endorsed by SOPAG and CoUL direct further actions by CDC in several cases. SOPAG asks CDC to follow up on specific SPIPTF recommendations as follows:

### **1a. Adopt the Shared Print in Place Policy for Prospective Collections**

The policy included in the Report Appendix has been revised, as CDC recommended, to read “Changes to policy made by CDC in consultation with CDL Shared Print”, which reverses the statement in the Report submitted.

The “Guidelines for Replacement of Persistent Deposits in RLFs and Shared Print in Place Monographs” (11/18/11) that CDC just completed addresses the proposed charge to CDC to complete work on guidelines and best practices for replacement of shared print volumes, if that policy can cover both shared print in place monographs \*and\* serials. Since the document covers persistent documents in the RLFs, which include both monographs and serials, please advise SOPAG on whether or not further modification is needed for the Guidelines to cover shared print in place serials.

### **2. Develop principles for when to establish a Shared Print collection in place**

The CDC comments on this recommendation indicated that this is within the purview of CDC’s Shared Monograph Coordinating Group, and that principles will best be developed in an iterative process based on SMCG experience. SOPAG requests that CDC provide a progress report on whether or not principles are beginning to develop, how guidelines and criteria are developing, and what would be a reasonable timeframe to expect a first iteration of such principles.

### **3. Call for and implement shared print proposals for monographs.**

CDC comments on the SPiPTF report indicated that the SMCG had already begun to solicit proposals and that a project is already underway. SOPAG will assume that this is moving forward unless otherwise notified by CDC. Please also note that this recommendation is being forwarded to the NGTS Management Team as potentially relevant to the work of POT 7.

#### **4. Blue ribbon task force to coordinate prospective acquisition of Federal Documents.**

The CoUL will consider this recommendation pending the results of the work of the current CoUL/GILS task force on retrospective collection coordination by campuses.

Additionally, two SPIPTF recommendations that are to receive no current action are referred to CDC as areas to monitor. If/when developments occur in these areas that require action, SOPAG requests that CDC inform SOPAG.

6. Develop cloud-sourcing partnerships and services, initially for print monographs.

8. Encourage libraries to declare print resources that are mass digitized as shared print.

Although there were no specific SPIPTF recommendations about developments related to the following initiatives, SOPAG requests that CDC monitor developments in implementing the 21<sup>st</sup> Century collection, Hathi Trust and Google and inform SOPAG of any potential relevant actions that should be taken.

A number of the SPIPTF recommendations confirm actions already being implemented by campuses, and are referred to CDC as reinforcements of recommendations and actions that are endorsed for campus actions as appropriate.

7. Campuses adopt practices of contributing holdings when called for by WEST or JSTOR.

9. Deselect duplicate JSTOR print journal holdings systemwide.

10. Campuses deselect print monographs held at campuses that are also housed at NRLF, SRLF or both.

11. Deselect print journal backfiles for Bronze Archives declared by WEST partners.

12. Campuses and storage facilities adopt an annual practice of deselecting duplicates of Silver and Gold journal backfiles as they are declared and disclosed by WEST.

13. Campuses adopt an annual practice of deselecting print duplicates as shared print in place resources are disclosed.

#### **HOPS/RSC**

The Shared Print in Place Task Force (SPIPTF) Report recommendations as endorsed by SOPAG and CoUL direct further action by HOPS and RSC to adopt a common access policy for shared print resources (SPIPTF recommendation 1b). HOPS and RSC are already charged to make modifications to standardize loan periods. SOPAG asks HOPS and RSC to follow up on specific SPIPTF recommendation by including recommendations for standard loan periods for shared print in place items and a rota for ILL of shared print copies as a priority vs. other copies of an item in UC.

#### **NGTS Management Team**

The Shared Print in Place Task Force (SPIPTF) Report includes two recommendations as endorsed by SOPAG and CoUL that direct further actions to NGTS. SOPAG asks NGTSMT to follow up on these specific SPIPTF recommendations and direct them to the appropriate POTs to incorporate in their work

1c. Adopt the Bibliographic Standards for Shared Print Monographs.

The SPIPTF presented two options: The version representing current practice was endorsed by SOPAG and CoUL to allow any current or imminent SPIP projects to proceed. SOPAG refers

both versions of the standards to NGTS for the consideration of appropriate POTs working on cataloging practices and standards for appropriate revision and incorporation. Please note that the Melvyl Operations Team is being charge to look specifically at the LHR development and coordination with OCLC, WEST and others standardizing use of MARC 583. Please inform SOPAG if NGTS should also be involved in this particular aspect of the recommendation.

1d. Adopt the Standard Acquisition Practices for Shared Print

SOPAG charges NGTSMT to refer this recommendation to the appropriate POTs to align with development of the “good enough” record.

4. Call for and implement shared print proposals for monographs.

SOPAG recognizes that this recommendation crosses over work both by CDC and potentially by NGTS POT 7. Please refer this recommendation as appropriate.