

SYSTEMWIDE LIBRARY AND SCHOLARLY INFORMATION ADVISORY COMMITTEE  
LIBRARY PLANNING TASK FORCE

November 1, 2010  
8:30-10:00 a.m. (PDT)

MEETING NOTES

Attending: Lucas (chair); Cogswell; Doyle; Greenstein; Meyer; Miller; Schneider, Schottlaender (part);  
Waters; Wolpert  
Support: Farley (consultant), Lawrence (staff)

1. Introduction of Task Force members (All) (5 min)

Background: Task Force roster

2. Review of work to date (Lucas) (10 min)

Background: Meeting notes, Task Force meeting of October 4, 2010

3. Discussion of Issues and Strategies for Collections (Greenstein) (1 hour)

Background: "Collections Scenarios," DRAFT v.3, 10/28/2010

Lawrence explained that it was convenient and helpful to set out the constraints facing the libraries (in terms of budgets and space) in the context of collections, because the effects were relatively easily quantified and clear-cut. He began by crafting a characterization of existing collections, and then projecting the current situation forward with consideration for those known constraints. The projections suggest two observations: (1) there appears to be sufficient space for collections for the next 6-7 years with some creative use of facilities, but all facilities will be full shortly thereafter, and if there is interest in doing new things with existing space, "full capacity" will come sooner; and (2) the result of anticipated budget reductions and ongoing inflation will be to reduce the future rate of new acquisitions as well as the proportion of the world's information purchased or licensed by UC (as information production will continue to grow even as UC's acquisition rate declines).

In the course of the ensuing discussion, points raised included:

- It would be helpful to have a well-articulated understanding of the University's aspirations for the comprehensiveness of its collections.
- While most campuses and UCOP have tried to protect library budgets and support development of collections, in the long run operating funds are fungible; there is no "firewall" between library collections and operating budgets, and no library budget (including the CDL's) is guaranteed protection.
- While there is likely to be faculty (and library) concern about the possibility of reliance on external partners like WEST for significant portions of the UC print collection, it is important for the Task Force to develop an understanding of the appropriate level of scale (campus, systemwide, regional/national, etc.) for collections of various kinds, the trade-offs and "tipping points" that

characterize the boundaries between levels, and the principles that should be applied in planning and operating library collections at appropriate scale.

- The Task Force understands that it (and the University administration) cannot and should not dictate the collection planning decisions of campuses; rather, its role is to recommend systemwide strategies and investments so that campuses can make informed and properly incentivized decisions.
- The libraries have done a great deal of work to prospectively reduce unnecessary duplication and make collections more shareable across the system (see, e.g., The University of California Library Collection: Content for the 21st Century and Beyond at <[http://libraries.universityofcalifornia.edu/planning/taskforce/Attach5\\_collection\\_concept.pdf](http://libraries.universityofcalifornia.edu/planning/taskforce/Attach5_collection_concept.pdf)>), but these efforts face continuing organizational and conceptual challenges.

To assist the Task Force to more fully understand the issues related to creating and managing library collections at scale while leveraging the libraries' considerable experience in these areas, the Task Force will ask the libraries to identify clear and actionable collection principals that help the Task Force to understand both the scale at which collection development and management activities should take place and the systemwide roles and investments that might be necessary (ACTION: Lawrence).

Lawrence then briefly summarized the alternatives set out in the scenario for managing unnecessary duplication in the print collections and between print and digital, including (i) reducing duplication within and between the RLFs, (ii) eliminating redundant backfiles of print journals, (iii) reducing print holdings that duplicate digital holdings, and (iv) eliminating duplicates of materials held in common with external partners (e.g., WEST).

The Task Force determined to give the highest priority to the duplication reduction concepts that promised the greatest payoff in terms of space savings, and more generally to examine and refine the scenarios that promise the greatest savings in dollars and/or space. In response to Schottlaender's observation that work to achieve some of these potential savings is already underway, the group counseled that it would be useful for the libraries to (a) quantify progress and commit to specific goals in this area, (b) establish and document systemwide endorsement of these activities, and (c) identify areas where modest systemwide investments might facilitate the process. With regard to print/digital duplication (option iii. above), it was noted that decisions about de-duplication of print should be subject to the provisions of a preservation strategy or back-up plan for the digital, and conditioned on the uniqueness and the use rights of the digital content.

Schottlaender noted that he and CDL Director of Collections Ivy Anderson were very familiar with the plans and budget proposals developed for the WEST project and could on that basis of that experience begin to identify areas where systemwide investment could make a difference (ACTION: Schottlaender).

#### 4. Future data needs and requests (Lucas) (10 min)

Conference call/videoconference meetings are scheduled for:

- November 17, 10:00 - 11:30 am (Pacific)
- November 29, 10:30 – 12 noon
- December 13, 11:00 – 12 noon

It was suggested that we schedule a face-to-face meeting as soon as possible, preferably by the end of the calendar year. Schottlaender noted that the American Library Association's Midwinter meeting is scheduled for January 7-11 in San Diego, which could facilitate scheduling and travel for the group's out-of-state members (ACTION: Lawrence).

5. Next steps (Lucas) (5 min)