

UCLAS report for January 9 2015

UC Libraries Advisory Structure

Strategic Action Groups Bimonthly Reporting Template

For Systemwide Reports produced by the CC's Communications Manager

Report from SAG 3

Submitter: Diane Bisom, SAG 3 Chair

Report Period: November - December 2014

(In red if not to be communicated externally)

SAG Activity Highlights

SAG 3 Shared ILS/RMS Investigation Task Force

- SAG 3 sent the **SAG 3 Shared ILS/RMS Feasibility Task Force Report** to the Council of University Librarians (CoUL) (via the UCLAS Coordinating Committee) on October 7, 2014.
- The Council of University Librarians (CoUL) is now discussing the **SAG 3 Shared ILS/RMS Feasibility Task Fort Report**. CoUL has made no decisions on the recommendations or actions in this report, but has shared this report with UCLAS and campus library employees.
- The Executive Summary is publicly available on the SAG 3 website: <http://libraries.universityofcalifornia.edu/sag3/shared-ilsrms-tf-documents> under the "Shared ILS / Resource Management System Task Force" documents section. The full Task Force Report is also available to UC Library employees on the SAG 3 website as a password protected document. Instructions for requesting a password are available there, as well.
- The availability of these documents was announced via an email distributed through the UCLAS communication channel on January 6, 2015.

UC Federal Documents Archive Task Force

- SAG 3 sent the UC FedDocArc update and requested actions to CoUL (via the UCLAS Coordinating Committee) on December 22, 2014.
- The actions include a request for approval of a Shared Housing Agreement, and continued advocacy for free and open viewing and full PDF download of all federal documents in HathiTrust.
- The UC Federal Documents Archive Implementation Oversight Team has been charged and will begin in January 2015.

UC Shared Print Strategy and Operations Teams' Print Journal Archiving Campaign and De-Duplication Service Proposal

- SAG 3 forwarded the **UC Shared Print Strategy and Operations Teams' Print Journal Archiving Campaign and De-Duplication Service Proposal** to CoUL (via the UCLAS Coordinating Committee) on October 28, 2014.
- SAG 3 endorsed the **Proposal** "with the understanding that, since items will be volume-level verified (issue-verification is more costly), **vo lume-level validation standards will be developed** and **an assessment or audit process will be established** to determine how well the volume-level validation works, and to confirm the validation level proposed is sufficient. These two items can be developed by the Teams as the implementation process is worked out."
- SAG 3 requested CoUL's endorsement of the **Proposal**.

Collaborative Collection Development via Digitization (CCDD) Task Force

- SAG 3 submitted the SAG3 CCDD Task Force's proposal entitled "Digitization of UC Library Collections via Collaborative Agreement with a Vendor" for review by the Coordinating Committee.
- The Coordinating Committee has provided feedback, which the Task Force is incorporating.
- SAG 3 anticipates this proposal moving forward to CoUL, with a request for endorsement, in January 2015.
- If the proposal is endorsed by CoUL, SAG3 will have the CCDD TF develop a project team charge for SAG 3's review and approval.

Collection Librarian/Bibliographer Groups Concept Proposal

- SAG 3 provided an update about the UC Bibliographer/Collection Librarian Groups on November 5, 2014.
- SAG 3 provided an update via the an email distributed through the UCLAS communication channel on November 19, 2014, identifying these next steps for SAG 3:
 - Update the **Guidelines for UC Bibliographer Groups**, outlining expectations for roles, responsibilities, activities, and participation to ensure they remain vital and effective.
 - Work with current UC Bibliographer Groups to self-identify appropriate groupings such as mergers, separation, dissolutions or creations aligned with the academic needs and staffing across the UC Libraries.
 - Recommend support from CoUL to provide a common suite of resources and tools for use by all UC Bibliographer Group members as a building block to encouraging deeper collaboration between campuses (e.g. central hosting of wikis, web sites,

- rosters, listservs; collaboration tools for calls, collaborative documents and project sites).
- Develop a toolkit to aid UC Bibliographer Groups' function and communication with other UC collection-related groups.
- Encourage continued clarification and communication about the roles, responsibilities, and activities of UC collection-related groups to determine where modifications and new approaches are beneficial.
- Draft guidelines have been prepared, and are being reviewed by CLS, with distribution to Collection Librarian Groups scheduled for January 2015.
- Current Bibliographer Group chairs have been contacted and requested to provide a brief, annual report to SAG 3 on their group's activities. 14 reports have been received thus far.

Portico Assessment and Audit

- The Preservation Advisory Group (PAG) had received a charge from CDC to define an ongoing audit practice for licensed e-journal packages.
- PAG is now the Preservation CKG, and that group forwarded to SAG 3 their report findings, which indicate that Portico may not in fact provide the level of preservation of e-journals that Portico is supposed to ensure.
- SAG 3 is forwarding the Portico audit report to the appropriate individuals, and is requesting guidance.

RLF Access Issues Task Force

- In response to RLF access issues raised by LAUC-Berkeley, SAG 3 appointed a task force (Lena Zentall, lead (CDL), Heather Christenson (CDL), Kendra Levine (UCB), and John Riemer (UCLA)) to investigate and assess the issues, and to provide recommendations to SAG 3 on how the discussion might move forward to a positive resolution.
- The Task Force provided an investigative summary to SAG 3, and Lena Zentall (CDL) and Patti Martin (CDL) with Beth Dupuis (UCB) and Erik Mitchell (UCB) to discuss the findings, which indicated that the issues were primarily UCB-specific. SAG 3 forwarded the Task Force's investigative summary officially to Patti Martin in her role as SAG 2 Chair, for SAG 2 to pursue as needed.
- Beth Dupuis and Erik Mitchell will review the investigative summary with the appropriate people at Berkeley.
- SAG 3 thanked and concluded the Task Force on November 19, 2014.

Presentation on UCLDC Project

- Sherri Berger (CDL) and Catherine Mitchell (CDL) joined SAG 3's November 19, 2014 call to discuss the UC digital landscape, and the UCLDC (DAMS) project, which focuses on the management, aggregation, and sharing of UC's digital collections.

SAG 3 Bi-Monthly Report for September - October 2014

- SAG 3's report was submitted November 11, 2014

SAG 3 Work plan

- As requested by the UCLAS Coordinating Committee, SAG 3 prepared and submitted our **Work plan 2015**, with SAG 3 activities mapped to the strategic priorities assigned to SAG 3, on December 2, 2014.

SAG 3 Portfolio Manager

- Recruitment continues for a Portfolio Manager for SAG 3, to replace Leslie Wolf (CDL) who retired in October 2014.
- In the meantime, SAG 3 member Emily Lin (Merced) is serving as the Interim Portfolio Manager.

CLS Activity Highlights (Prepared by Kerry Scott, Chair, CLS)

Additional Notes for the Communications Manager: