January 14, 2014

To: UC Library Colleagues

From: UC Council of University Librarians (UC CoUL)

Between August 2009 and August 2013, the UC Libraries engaged in three phases of a "Next Generation Technical Services (NGTS)" initiative, with the goal "to move Technical Services operations to the network level and to pursue a transformative approach to the 'backend' infrastructure needed to support the user discovery experience." During each of these phases and the resulting pilot projects, it has become apparent that many of the recommended efficiencies and shared services would be more attainable with a shared next-generation Integrated Library System (ILS) or Resource Management System (RMS) infrastructure.

Additionally, as collaborative collection development and processing opportunities are explored in support of the Council of University Librarians "UC Libraries Systemwide Plan & Priorities FY 2014-2017", a shared system could provide the necessary tools to facilitate this collaboration.

Based on the recommendations and "lessons learned" in the NGTS Management Team Final Report (August 2013) (http://libraries.universityofcalifornia.edu/groups/files/ngts/docs/NGTS_final_report_0813.pdf) the CoUL has developed a charge for investigation of the feasibility of a shared next-generation ILS or Resource Management System. This exploratory process does not presume that the UC Libraries will choose to adopt a shared ILS, either as a single institution or by a subset of the campuses.

The charge was originally directed to SOPAG, with a report requested by December 31, 2013, but with the new University Libraries Advisory Structure (UCLAS), Strategic Advisory Group 3 (SAG 3: Collection Building and Management) has been assigned to launch a project team with this charge as a priority item; a revised date for a report has not yet been determined. The CoUL charge to SAG 3 is available here: http://libraries.universityofcalifornia.edu/groups/files/sag3/docs/shared-ILS-charge-2013.pdf

SAG 3 has formed a Shared ILS/RMS Investigation Subgroup, chaired by Vicki Grahame (UCI) to address the CoUL charge. Here is the SAG 3 Shared ILS/RMS Investigation Subgroup membership:

Vicki Grahame	(Subgroup Chair, SAG 3/UCI)
Diane Bisom	(SAG 3 Chair/UCR)
Marcia Barrett	(SAG 3/UCSC)
Judy Consales	(SAG 3/UCLA)
Martha Hruska	(SAG 3/UCSD)
Angela Riggio	(SAG 3/LAUC Representative)
Leslie Wolf	(SAG 3 Portfolio Manager)
Todd Grappone	(SAG 2/UCLA)
Rosalie Lack	(Coordinating Committee Chair/CDL)
MacKenzie Smith	(CoUL/UCD)

At this time, the Subgroup, as suggested in the charge, is in the process of engaging a consultant for assistance with the initial stages of the investigation which include a review of the next-generation ILS/RMS product market and investigation of the attributes and benefits of the new products with most potential for UC; and determining the level of interest in pursuing a shared ILS/RMS system among UC campuses.

As the investigation progresses, there will be ample opportunities for engagement, input, comment, and review from all sectors and colleagues of the UC Libraries. After the Subgroup completes its charge they will make recommendations on next steps to CoUL.

Please note that it is critical that all UC Libraries colleagues refrain from engaging with ILS and RMS vendors about the process at this point. If you are approached by anyone about this exploration, please simply reply that you have nothing to share at this time. As you know, the University of California has strict RFI and RFP guidelines and rules, and it is imperative that our investigation be conducted appropriately following the highest UC standards.

Please feel free to direct questions about this initiative and the related processes to your University Librarian.

Thank you for your support of this important investigation.