

Working Group for Systemwide Print Collection Management Strategy - Charge

Charged by: Council of University Librarians (CoUL)

Reporting to: Direction & Oversight Committee (DOC)

Background and context:

This charge and the activities of this working group exist within the context of the present and evolving UC Collection Vision, [updated in March 2017](#), and the UC Collection Strategies Planning and Priorities documents and roadmaps which are created from time to time. Changes to the vision documents are made consultatively and collaboratively.

The UC Libraries, collectively, have a wealth of print resources that continues to grow, but an increasingly limited available physical footprint exists to house the physical collections. The Regional Library Facilities (RLFs) are essential shared space to alleviate local constraints on physical collections, but they too represent finite space, and exceptional deposit requests and requests for increased allocations have become more common and challenging to accommodate.

Underlying the spatial and logistical challenges of managing UC Libraries' physical collections is the need for coherent and coordinated approaches that move the system intentionally to the retention of the print collective collection that will best serve user communities.

The Council of University Librarians (CoUL) therefore charges a co-convened group of Shared Print Strategy Team (SPST) and Shared Content Leadership Group (SCLG) members to evaluate and recommend systemwide, coordinated approaches to RLF deposits and managing the UC Libraries print collective collection. While the primary concern of this working group is print collections, connections between print and digital collection strategy are expected to make part of the discussion. Similarly, while the practical focus of this group is on retrospective collections, findings may have implications for prospective shared print in the UC system. The outcomes and recommendations of this group will be shaped by grappling with a fundamental question of how the UC system views the role of the RLFs and to what degree the trajectory of RLF use warrants systemwide, coordinated approaches.

Environmental factors:

- Imminent SILS migrations
- Implementation of new Inventory Management System at the RLFs
- Construction of NRLF 4
- Increasingly layered and networked approaches to print management including planning and coordination with other shared print initiatives
- Academic libraries serving diverse needs in their physical space (collaborative study, teaching, new technology, academic support)

Timeline:

Initial 12-month period with possible renewal, as advised.

Scope of Work (in sequence):

1. Part 1 (SPST, est. 2 months) - Define existing categories of shared print collections and their relations to one another. *If relevant, submit recommendations for clearly defining levels of UC shared print collections.*
 - a. Collections subject to formal shared print agreements (e.g., JSTOR, WEST, HT)
 - b. Collections subject to the persistence policy
2. Part 2 (SCLG, est. 5 months) - Gather community input and evaluate what should be represented in the “one UC Library Collection” and the retention behaviors best-suited for different categories of print material. If possible, *define a consensus-driven, systemwide print retention schema* to help guide UC Libraries in their local print management and deposit decisions (e.g., best practices). Include consideration of how UC should leverage regional, national, and North American shared print initiatives and principles both to guide UC’s local print management and participation in the broader shared print efforts.
3. Part 3 (Mixed membership, SPST and SCLG, est. 5 months)
 - a. Review and recommend priority areas for the expansion of print-digital collection strategy (e.g., joint licensing/shared print agreements, targeted digitization, infrastructure to digital access on the basis of print ownership, reflecting digital status in print metadata).
 - b. Explore solutions for RLF allocation management based on intentional, coordinated deposit activities among the campus libraries (e.g., project-based like FedDocArc or JACS, subject-based, or need-based).
 - c. Evaluate and submit recommendations to maximize the opportunities for collective print management through SILS.

Consultation groups:

Shared Print Operations Team

Shared Print Coordinators (formerly JACS Coordinators)

Shared Content Leadership Group

Shared Print Strategy Team

Campus Committees on Library and Scholarly Communication (COLASCs) and University Committee on Library and Scholarly Communication (UCOLASC) (per a CoUL-approved faculty engagement plan)

Systemwide Library and Scholarly Information Advisory Committee (SLASIAC) (via CoUL)

Deliverables:

Faculty Engagement Plan (complete as early as possible)

December 2020/January 2021: Mid-charge report

June/July 2021: Final report

This Working Group will report directly to DOC, which will review and annotate reports and recommendations before presentation to CoUL for final decision-making. One or both of the co-conveners shall be present to support presentations to CoUL.

Conveners:

Alison Wohlers (manager, SPST)

Jim Dooley (chair, SCLG)

Membership:

Part 1 - SPST

Sarah Troy (SPST, DOC) to act as liaison between SPST and DOC for Part 1.

Part 2 - SCLG

Rice Majors (DOC) will join SCLG for Part 2 to act as liaison between SCLG and DOC.

Part 3 - 7-12 members drawn from SPST and SCLG (including two co-conveners)

Cathy Martyniak (SRLF Director) and Rice Majors (DOC) to be ex officio members of this group. Meeting frequency is anticipated to be monthly, with work carried out by members in between meetings.

Additional meetings may be scheduled as necessary.