

Shared Content Leadership Group

Meeting Minutes, October 27, 2017

Present: Martha Hruska (SD, Chair), JoAnne Newyear-Ramirez (B), Tiffany Moxham (R), Alison Scott and Roxanne Peck (LA), Kerry Scott (SC), Julia Kochi (SF), Bob Heyer-Gray (D), Jim Dooley (M), Eunice Schroeder (UCSB), Ivy Anderson (CDL), Becky Imamoto (LAUC), Wendy Parfrey (CDL)

Absent: John Renaud (I)

Announcements, Housekeeping and Calendar Review

ACTION: October 13 notes approved

ACTION: For Nov. 17th meeting, Julia Kochi will send out a new Zoom invitation; Martha Hruska will cancel hers. Meeting will be from 11-12:30pm.

Web Archiving CKG is inactive. Katherine and Perry are going to see if it can be revived. Katherine will be liaison for CA.gov project.

New/Transfer titles and low use/low value titles

- Transfer titles. ACTION: CDL will review sequencing of process since this year's process was a bit confused (e.g., holdings check requested earlier than stated in other emails, email said check would be sent to different person, etc.)
- Title swapping procedure: ACTION: CDL will distribute to SCLG rep a list of low use/low value titles the week of Nov. 6th. Each campus would then determine titles that we want to keep by Nov. 22nd (2 categories: must keep (veto - will keep in package even if others okay to cancel) and like to keep. May overlap with voting for transfer/new titles that we want to add. Goal of whole project is to be cost neutral.

Do we want a separate task group to look at what titles in Elsevier's Freedom Collection we wouldn't want to lose? We are allowed to cancel the Freedom Collection without penalty.

Tier 1 Review

Purpose: Identify databases with significant overlap that should be reviewed for cancellation and also identify potential alternatives.

SCLG develop overall principles to guide their review (E.g., ability to work well with SFX and other discovery tools, target high cost per uses, declining use over 3 years).

TF should review all active databases, divide it into different disciplines, and remove unique databases (how do we define "unique"?).

Timeline needs to be extended to end of April.

Add deliverables to charge with due dates:

- Identify resources that would be targeted for review - by end of January
- Develop evaluation criteria (e.g., cost per use, title overlap, etc.) that will be used to assess targeted resource
- Charge should include groups looking at alternatives, regardless if we currently subscribe

TF is core group (6 members) with reps from each subject area and CDL liaison. Their responsibility is to coordinate review with their subject colleagues. You don't need to be a member of task force to be a member of a sub-group. Sub-group may be a CKG if there's an active one in that area.

Subject areas will be General/Reference, Life & Health Sciences, Physical Sciences, Social Sciences, and Arts & Humanities.

ACTION: Clean up charge and sign off by email by Wednesday, Nov. 1 (All).

ACTION: Put forward names for TF members by Monday, Nov. 6. Becky is willing to serve as General Reference expert and will be SCLG liaison.

ACTION: Each rep try and talk with UL about strategic collection goals, beyond simply cost containment.

Licensing Update

CDL Updates

New Assisted Tier 3 Website – CDL created a new website describing the Assisted Tier 3 process. Assisted Tier 3 acquisitions are local campus purchases that are related to Tier 1 licenses signed by CDL. Campus acquisitions and licensing staff are encouraged to follow the steps described and provide any comments/feedback.

Transfer Title Process for 2017 (Reminder) – CDL Acquisitions will follow the same process as last year, as below. Please contact CDL Acquisitions at cdlacq@cdlib.org if you have any questions:

1. By October 16 (Mon):
 - a. Please first review the already suggested and known transfer titles on this Google sheet (also linked to from the form). CDL Acquisitions has already populated the sheet with the titles we've discovered, and you will also see if other campuses have already suggested a title.
 - b. Please indicate any additional titles that you'd like to see considered as additions to CDL packages. Here is the form to use: <https://goo.gl/forms/fENOZvTast4IF3yp2>.

2. By October 30 (Mon), please submit your local/campus holdings information for the suggested titles, using the Google sheets that CDL Acquisitions will send to each SCLG representative. Based on the holdings information, Adriana will calculate the costs for adding and removing titles and will come up with an estimate of cost shares.

3. In November, we will conduct campus voting on requested titles. CDL Acquisitions post the master spreadsheet with all the titles and estimated costs on SharePoint for your review. For the actual voting, we will create a simpler Google sheet with minimal information.

Cataloging (SCP) – The JSTOR open access offering of 1200 RAND titles will be cataloged by the end of this week and distributed in Monday’s file. Please contact Donal O’Sullivan (SCP) with any questions.

CDL Acquisitions (Reminder) – FreshDesk Customer Relationship Management (CRM) Software – CDL Acquisitions implemented FreshDesk, a CRM software, to track customer inquiries and CDL Acquisitions’ responses. Please use cdlacq@cdlib.org to contact CDL Acquisitions, instead of individual email addresses. We are curious to see if the system is helping with the efficiency and responsiveness, and will review transaction reports on a quarterly basis and welcome your feedback. Please contact Peter Rolla (CDL Acquisitions) with any questions and/or feedback.

Acquisitions-Related Document Sharing on SharePoint – CDL Acquisitions will soon start sharing acquisitions-related documents on SharePoint with SCLG members and campus acquisitions staff via restricted access. All 10 campuses have submitted their acquisitions staff’s contact information so that they can access these documents. CDL has been testing the site with several campus acquisitions staff to obtain initial feedback, and will be ready for an all-campus trial once all logins are confirmed and relevant documents are posted (currently ETA mid-November). CDL staff are taking some SharePoint courses so that the site is set up in a user-friendly manner. Background: CDL hopes to increase efficiency of the acquisitions operation and enhance services to UC campuses by sharing the following documents on SharePoint: payment documents, and financial expenditure reports (projected annual expenditures, monthly expenditures, deposit balance – customized for and restricted to each campus).

LICENSES

CA.gov – SCLG unanimously approved a co-investment proposal (equal share among participants) to continue funding the web archiving crawl of State of California websites via the Internet Archive. This is a project managed by Kathryn Stine (CDL) that also includes funding from Stanford University along with the UC Libraries.

Knowledge Unlatched – Seven campuses pledged to support the KU frontlist (151 titles) in 2017. Three campuses will also support the new Humanities journal collection (21 titles) and the Language Science Press ebooks (30 titles) with a three-year commitment.

CRC ENGnetbase – This is the final co-investment year of the ‘evidence-based’ pilot to acquire engineering ebooks in the Taylor & Francis/CRC Press collection. Michele Potter (UCR) organized the

data analysis and collective decision process based on usage data and campus activity. There were 104 titles chosen in the 2016 frontlist. Beginning in 2017, all CRC content including engineering titles is available to all campuses via the STMnetbase license.

UC Press – Case Studies in the Environment was launched in 2017 to represent a new editorial direction for UC Press. While the UC Press package offers relatively inexpensive, traditional journals, Case Studies in the Environment represents a more comprehensive coverage of an important STEM topic. Case Studies will be priced separately from the journals package in 2018 and is included in the list of title transfer and new launches under evaluation for 2018.

NANO trial – The PSE CKG completed the three-month trial and there was minimal interest to consider licensing the database from Springer Nature.

Springer Nature (SN) – CDL sent its edits (2nd round) to Springer Nature on 10/23 (Mon). It's a 70-page document with numerous edits from both parties (UC/CDL and SN), and include terms for UC campuses as well as Lawrence Berkeley National Laboratory (LBNL) and Lawrence Livermore National Laboratory (LLNL). CDL hopes to follow through with the terms that were negotiated earlier, and is carefully editing. Access to listed licensed products is active, including Springer journals, Springer Protocols, Nature journals for all UC campuses, and Pediatric Research for five campuses (Berkeley, Davis, Los Angeles, San Diego, and San Francisco.) We'll inform SCLG once it's signed.

Berg Fashion Library – The new contract was finalized/signed on 10/23 (Mon). UCSD joined the subscription starting this year.

Annual Reviews – The vendor requested additional edits after CDL signed the contract. CDL replied with some edits earlier this week.

Oxford University Press is requesting UC to update its license, and CDL is reviewing the draft.

The Licensing status (request CDL password) page has been updated.

Upcoming Platform Transitions

Taylor and Francis Ebooks (CRCNetBase) - Ebooks hosted on the CRCNetbase and T&F ebooks platform are moving to a new (consolidated) platform. Permanent redirects should be in place on 10/31. CDL is coordinating transition activities for systemwide and multi-campus titles, campuses have been contacted regarding locally licensed content. Overlap access is currently available. More information at <http://www.cdlib.org/cdlinf/2017/10/19/taylor-francis-ebooks-transition-to-new-platform/>

Reaxys - Overlap access is now available. More information at <http://www.cdlib.org/cdlinf/2017/10/02/new-reaxys-is-now-available/>

Ebrary Momentum Press - Momentum Press content will be moving from the Ebrary platform to the IGP platform (to be hosted along with existing Business Press content). CDL will be coordinating multi-campus purchased content and will coordinate with campuses for local content.

Lexis-Nexis - Lexis Nexis will be transitioning to the Nexis Uni platform in December. Overlap access is currently available. More information <http://www.cdlib.org/cdlinfo/2017/08/08/lexisnexis-academic-becomes-nexis-uni/>

Global Financial Data – Global Financial Data is launching a new updated interface on 11/1. This interface will use the same URL as the current interface, so no access changes are needed. More information about the new interface will be published in CDLInfo shortly.