

Charge: SILS Cost Sharing Task Force

Introduction

The Systemwide Integrated Library System (SILS) working group will deliver potential SILS cost sharing models to the Council of University Librarians (CoUL) at the end of phase 3. In consultation with CoUL, the SILS working group has determined that a task force should first develop future-oriented SILS cost sharing principles. While this initial SILS Cost Sharing Task Force charge (i.e. part 1) will focus on *principles*, it is likely that the task force will subsequently be charged to define SILS cost sharing *metrics* and ultimately cost sharing *models* for the SILS working group and CoUL to review and endorse.

The cost sharing principles will be fundamental concepts that the task force will use to develop metrics. For example:

- a principle might be that the SILS cost sharing model will use data that is trusted and verifiable, and a corresponding metric might be academic FTE as tracked and reported by the Office of the President

The cost sharing model will then outline the metric or metrics used (and how) to allocate the SILS total contract cost across the system. For example:

- a multi-metric cost share model might stipulate that CDL will pay for a portion of the total contract cost off the top (XX%), and then a portion is evenly distributed across the campuses (XX%) and the remaining cost is divided based on campus academic FTE

Charge

Building on the groundwork established by the SILS working group¹, the SILS Cost Sharing Task Force will develop a set of principles on which cost sharing metrics and potential models will be developed. The principles need not be overly prescriptive (i.e. prescribing whether one or multiple variables will be employed in a model). The task force should consider including principles related to fairness among different sized campuses with distinct budget circumstances, present operational realities (e.g. the RLFs, the Shared Cataloging Program), incentivizing shared and systemwide services, and the [SILS project principles and shared assumptions](#). The task force should consider and favor principles that support metrics relevant to the rapid evolution of academic libraries and transformative services.

Reporting line

The SILS Cost Sharing Task Force will report to the SILS working group. Working group representatives on the task force will facilitate communication with the working group and ensure timely feedback and guidance is provided to the task force.

¹ A subset of the SILS working group developed preliminary principles and carried out interviews with peer consortia, re: the cost models employed for their shared ILSs.

Timeline and deliverables

Part 1 (January 14th - February 15th, 2019)

- Review and discuss the preliminary principles and research carried out already by a subset of the SILS working group.
- If necessary, identify and carry out additional research and investigative work in terms of exploring other/non-UC cost allocation practices and potential principles.
- Develop SILS cost sharing principles to be delivered to the SILS working group on Feb. 15. The principles will then be shared with CoUL for review and endorsement (in full or endorsement of a subset) at the March 11th meeting.

Part 2 (March 25th - April 26th, 2019)

- *Pending CoUL and SILS working group feedback*, and likely additional instruction, establish metrics that are in accordance with the SILS cost share principles for development of potential SILS cost share models. The task force will consider possible SILS scenarios where the system better supports and utilizes shared and systemwide services, and determine what behaviors the SILS should incentivize and how (i.e. what metrics create the right incentives). The task force will similarly be careful to avoid metrics that dis-incentivize desired behaviors. Metrics do not need to be limited to data currently collected.
- Potential metrics will be shared with the SILS working group on April 26th (to review at their May 3rd meeting), and then with CoUL for review and feedback at their May 17th meeting.

Part 3 (May 20th - July 5th, 2019)

- *Pending CoUL and SILS working group feedback*, and likely additional instruction, develop potential SILS cost share models for the SILS working group to review and for CoUL to review and vote on.
- Potential cost share models will be shared with the SILS working group on July 5th. The cost share models will then be shared with CoUL for review and endorsement at the July 19th meeting (note: the date of the July CoUL meeting has not yet been finalized).

Roster

The task force includes both existing working group members and those new to the SILS cohort. A variety of expertise is represented across the task force, potentially including collection development, scholarly communication, electronic resource management, systems, planning and resource management, and the regional library facilities.

- Erik Mitchell, Chair (UCSD, CoUL, SILS-WG, SILS-U)
- John Bono (UCSC, SILS-WG, SILS-P, SILS-M)
- Jeffrey MacKie-Mason (UCB, CoUL)
- Rice Majors (UCD, DOC)
- Cathy Martyniak (SRLF, SILS-WG, SILS-P, SILS-M)
- Haley McEwan (UCSF)
- Doris Wang (UCLA)