

## UC Libraries Collaborative Work Tools Project Team Charge

### Introduction

Through its collaborative efforts, the UC Libraries collectively manage a portfolio of [over thirty shared services](#). Of recent note is the Systemwide Integrated Library System (SILS), launched in July 2021 under the service name UC Library Search. The [SILS Communication and SILS Project Manager Operation Leads](#), charged with providing communication leadership and collaboration tools for use by the SILS Phase 4 cohort, have made a significant contribution to the project, including developing a model for collaborative systemwide work utilizing shared tools. Other UC Libraries service teams and UC Libraries Advisory Structure (UCLAS) groups have expressed interest in consolidating and updating existing project and service workspaces, similar to the SILS model.

### Charge and High-Level Deliverables

Recognizing the value in supporting cross-campus collaboration and improving information sharing related to systemwide activities and services, the Direction & Oversight Committee (DOC) charges the UC Libraries Collaborative Work Tools Project Team (“Collaborative Work Tools PT”) to:

- **Establish the user requirements** for a set of tools and collaborative workspace (e.g., Confluence, Slack) to be utilized by UC Libraries service teams and advisory structure committees;
- **Recommend an identified tool set and submit for approval** to DOC a proposal outlining options for 1) required startup and ongoing funding, 2) potential cost share models, and 3) a model for ongoing administrative management;
- **Prioritize UC Library Search** as the first service cohort to occupy the new workspace; and
- **Identify other UC Libraries shared service teams** that may benefit from updated workspaces and collaborative tools and propose a project plan for migration to the new environment.

The information architecture of the collaborative tools developed by the project team should be designed to accommodate multiple UC Libraries services and projects, with the UC Library Search service as the first “tenant” of the new infrastructure. The project team’s work should proceed in phases, with the UC Library Search service as Phase 1 priority.

### Principles for Selecting Work Tools

The principles for selecting work tools established by the SILS Shared Governance Tools Subteam (2019) shall guide the decisions of the Collaborative Work Tools Project Team, including:

- Use cloud-hosted products when possible rather than hosting on premises.
- Choose established, widely-adopted tools when possible to minimize overhead and encourage adoption.

- Minimize the number of tools; fewer tools is better.
- Simple is better; don't use a complex tool when a simple one will suffice.

## Early Assumptions

**Collaborative work tool selection:** Given the successful adoption of the Atlassian Confluence and Slack messaging application by the UC Libraries, unless there is overwhelming reason to adopt alternatives, expanding their use beyond UC Libraries Search is assumed to be the most likely choice of work tools.

**Confluence administrative home:** The California Digital Library will be the administrative home of the Atlassian Confluence tool and potentially other collaboration tools.

## Cost Share

The current Atlassian Confluence cloud subscription (uc-sils.atlassian.net) expires December 2021; the cost for the 2021 billing period (annual payment) was \$4,384 for 200 academic users / standard plan. The 2022 billing period is expected to include the following:

- No change to current number of users (200 academic); standard plan; cloud; annual payment.
- As the administrative home of the Confluence tool, CDL has requested a quote for 2022 be generated by Atlassian; minimal cost increase/change as compared to 2021 is anticipated.
- The primary use of Confluence for 2022 will be the UC Libraries Search service; subscription costs will be covered by existing SILS MPI funds. There will be no recharge of cost shares to campuses for 2022.

The Administrative Services Advisory Group (ASAG) will draft a Memorandum of Agreement (MOA) outlining respective roles and cost-sharing responsibilities of CoUL (campus libraries and CDL) and the administrative home(s) of the collaborative tools. Early assumptions include that beginning January 2023, costs related to the Atlassian Confluence subscription will be shared equally (9.1% each) by the ten campuses plus CDL. The invoice will be paid by the administrative home (CDL), followed by a recharge of equal cost shares to the campuses.

Currently, the administrative home of the Slack messaging application (free plan) is the UC Davis Library. If the Collaborative Work Tools PT recommends transitioning from the free plan to a paid plan, or from UC Davis Library to another administrative home, a process and cost sharing model shall be proposed for approval by DOC and CoUL.

## Timeline and Activities - Phase 1 (Months 1-7)

- Gather the user requirements for a set of tools and collaborative workspace (e.g., Confluence, Slack) to be utilized by select UC Libraries service teams and advisory structure committees, with priority given to the UC Libraries Search service

- Develop recommendation for the procurement of a set of tools and collaborative workspace; submit a proposal to DOC outlining 1) required startup and ongoing funding, 2) cost share model, 3) recommended administrative home and estimated staffing requirements, and 4) a model for ongoing administrative management
- Procure tool(s) and establish cost share model (CDL and ASAG representative to coordinate)
- Configure acquired tool set, e.g., establish information architecture, navigation, site templates, user accounts, etc.
- Coordinate the development of new, and migration of existing, content to new tool set
- Draft guidelines / best practices for use of the tools
- Develop recommendation for ongoing development and governance of collaborative workspace and tools for approval by DOC
- Draft Phase 2 charge

The experience and knowledge of the Phase 4 SILS Communication Operation Leads and the SILS Project Manager Operation Leads will be the project team's primary source of information related to the UC Library Search cohort.

## Phase 2 (Months 8-12)

- Continue and extend the work of Phase 1
- Identify UCLAS groups and UC Libraries shared service teams that would benefit from migration to the new workspace and tool set; develop a migration project plan and timeline
- Coordinate the migration of identified content into the new workspace and sunsetting of old workspaces
- Provide support for the adoption of the new tool set by shared service teams

## Reporting Line

The UCL Collaborative Work Tools Project Team is charged by and reports to the UCLAS Direction & Oversight Committee (DOC). The project team will have an assigned DOC liaison who possesses an overarching vision of how UC systemwide services and projects are introduced, resourced, moved forward and operationalized. Proposals that require a commitment of financial and human resources will be funneled through DOC to the Council of University Librarians for approval.

## Related Groups + Resources

Communication Operation Leads (SILS Phase 4)

Project Manager Operation Leads (SILS Phase 4)

[University of California Libraries website](#) manager (Rachael Hu)

Multiple UCLAS and UC Libraries shared service teams (as necessary)

[UC Communication and Collaboration Tools Project Team Final Report](#) [2017]

## Membership

Membership will be expertise-based and drawn from an appropriate cross-section of campus library staff and CDL; members should bring a range of skills and experience to the project team, including:

- Ability to envision a systemwide approach to problem solving;
- Experience working on systemwide services or projects;
- Assessment or user experience (UX) design skills; and
- Experience administering or configuring collaborative work tools, e.g., Confluence, Slack, Google Docs, Box.

A DOC liaison will be assigned to the project, with responsibilities including partnering with the project team lead(s) in initiating and moving the project forward, ensuring project progress, and providing appropriate status reports to the UCLAS structure. Additional anticipated roles and membership:

Role	Membership
<b>DOC Liaison</b>	Roger Smith, UCSD
<b>Project Lead - manage deliverables + timeline; project communication</b>	TBD
<b>Developer - configure, customize Confluence</b>	TBD
<b>UX Designer - establish requirements, info architecture, template selection</b>	Rachael Hu, CDL
<b>SILS / UC Library Search representative - represent cohort needs</b>	Lena Zentall, CDL - or - Christine Barone, UCLA
<b>UCSF Confluence admin team member (consultant role / liaison to UCSF team)</b>	Zach Silveira, UCSF
<b>ASAG representative - assist in procurement and cost share models</b>	Bill Garrity, UCD