

## **University of California (UC) Libraries Systemwide Annual Plans and Priorities**

**2023-2024**

Endorsed by the University of California (UC) Council of University Librarians (CoUL), with feedback and guidance from the UC Libraries Direction and Oversight Committee (DOC), on September 27, 2023.

Projects/activities	Directly accountable	Lead(s) responsible for work
1. Actively transform scholarly publishing and communication	CoUL	PTWG, SCLG, additional teams to be assigned
2. Plan and design a UC service to improve access to digital books	CoUL	LEND
3. Evaluate and adjust long-term planning for collection management	CoUL	CoUL, SLFB
4. Investigate and pursue expanded and new UC Libraries shared services	CoUL, DOC	DOC, SILS LG, additional teams to be assigned
5. Further explore and evaluate artificial intelligence and machine learning (AI/ML) and systemwide opportunities	CoUL	CoUL, DOC

Table 1. Annual project-based priorities, as identified by CoUL and DOC.

The projects and activities noted in Table 1 are advanced at the systemwide level to further [the UC Libraries' long-range goals](#), which are to:

- 1. Enrich the systemwide library collection:** Print, digital, data, and archival collections of the University of California are fundamental building blocks for the University's teaching, research, patient care, and public service programs. Building and managing collections to provide access to a broad array of scholarly information resources in support of these programs remains one of the highest priorities for the UC libraries.
- 2. Maximize discovery of and access to information resources:** Faculty and staff are adopting new techniques to identify, find, and use information resources. As user behaviors evolve, and we fulfill our shared commitment to accessibility, the UC libraries will implement systems to provide better, faster, and broader access and support.
- 3. Optimize and develop shared services for operational efficiency and systemwide impact:** The libraries collaboratively build shared technical infrastructure, collections and services of distinction in response to end-user and institutional needs, and to eliminate duplication of effort and tap into our collective expertise. Systemwide efforts also broaden each individual library's capacity to invest in its disciplinary needs and the services and activities best advanced at the campus level.
- 4. Expand engagement in scholarly communication:** The UC libraries are leading participants in regional, national and international efforts to enact sustainable scholarly communication transformation at-scale. The libraries collaboratively accelerate the transition away from traditional, high-cost subscriptions and pursue new publishing and reading models that realize the full potential of making scholarly information and outputs widely accessible.
- 5. Strengthen and reflect diversity, equity, inclusion and belonging in library services, resources and operations:** Excellence in library services, just as academic excellence, is fed by a plurality of ideas and perspectives, and cultivation of inclusive working and learning environments where diversity is respected and welcomed. As the UC Libraries collaboratively seek to further the teaching, research, health care and public service missions of the University, we will strengthen and reflect diversity, equity, inclusion and belonging in all facets of our systemwide work. *This includes work undertaken to advance all long-range goals as well as employee retention and development, and governance.*

This plans and priorities document outlines the annual systemwide projects and time-limited activities that involve multiple UC Libraries Advisory Structure (UCLAS) and/or project-based teams and require regular engagement with the Council of University Librarians (CoUL) and Direction and Oversight Committee (DOC). The work outlined herein should also be considered and reflected in other systemwide work areas and operations, as appropriate.

DOC-managed priorities are based on these systemwide plans and priorities, and [available here](#).

Please note: As plans and priorities evolve, become operationalized and are then further delegated to teams and groups within UCLAS, they are represented in the UCLAS group/team and service-specific priorities and work plans, rather than in this plans and priorities document. Through UCLAS and shared service reporting and communication structures, CoUL, DOC and other groups ensure that these projects are tracked and shared with leadership and the broader UC Libraries community as needed. In other cases, such as with Affordable Course Materials and Open Educational Resources, the next steps and work for the coming year has transitioned to the systemwide level outside of UCLAS. In these cases, while CoUL monitors these efforts and may have representatives participating, they are not library-led activities and so not included in the plans and priorities.

Projects and near-term goals

**1. Actively transform scholarly publishing and communication**

Collaborate with a variety of partners and stakeholders to provide leadership in transforming scholarly publishing into a system that is economically sustainable and ensures the widest possible access to a range of scholarly outputs. Explore and experiment with local and systemwide initiatives to more strategically further the large-scale transition to open access. Actively expand UC author access, across disciplines, to affordable open access publishing models.

**Relevant Long-Term Goal(s):**

- (4) Expand engagement in scholarly communication
- (5) Strengthen and reflect diversity, equity and inclusion in library services, resources and operations

Near Term Goal(s):	Leads(s):
<ul style="list-style-type: none"> <li>• Advance and assess the transformative open access agreements portfolio, ensuring alignment with UC’s priorities of sustainability, cost containment, author rights, compliance with funder mandates and global equity in open access publishing (to be done in consultation with CoUL, administrative leaders, faculty leaders and authors); continue to co-develop the necessary publishing workflow infrastructure to support UC’s multi-payer model; continue to develop shared communication objects and outreach campaigns focused on UC author engagement.</li> </ul>	TRANSFORM
<ul style="list-style-type: none"> <li>• Explore additional opportunities to strategically advance open scholarship at scale and through systemwide initiatives. Near-term priorities for planned and potential teams include:               <ul style="list-style-type: none"> <li>○ High-level exploration of the open scholarship/science and infrastructure landscape;</li> <li>○ Pathways for further advancing research data management;</li> <li>○ Open monographs; and</li> <li>○ UC-wide open access publishing fund.</li> </ul> </li> </ul>	CoUL, TRANSFORM, SCLG, additional teams to be assigned

**2. Plan and design a UC service to improve access to digital books**

Investigate and pursue comprehensive, systemwide digitized book access through [Project LEND](#), a multi-phase project that commenced in 21/22. Phase 2 of the project began in January 2023 and will continue through December 2024; additional phases are planned.

**Relevant Long-Term Goal(s):**

- (1) Enrich the systemwide library collection
- (2) Maximize discovery of and access to information resources
- (5) Strengthen and reflect diversity, equity and inclusion in library services, resources and operations

Near Term Goal(s):	Group(s):
<ul style="list-style-type: none"> <li>Continue work on Project LEND phase 2 service design, which is focused on: (1) user requirements, including equitable and inclusive service design; (2) technology needs and opportunities; (3) the legal framework for in-copyright access; and (4) desired collection scope. This work is being completed by project team members and in partnership with applicable experts and external library stakeholders.</li> </ul>	LEND

**3. Evaluate and adjust long-term planning for collection management**

Consider and reassess long-term planning for collection management, specifically shared storage, access and preservation needs, centering user experience/requirements and physical capacity limitations in decision-making.

**Relevant Long-Term Goals:**

- (2) Maximize discovery of and access to information resources
- (5) Strengthen and reflect diversity, equity and inclusion in library services, resources and operations

Near Term Goal(s):	Group(s):
<ul style="list-style-type: none"> <li>Support ongoing work with UCOP and systemwide stakeholders to review and identify potential funding solutions for RLF operations budgets.</li> </ul>	CoUL, SLFB
<ul style="list-style-type: none"> <li>Identify and advance additional shared priorities and strategic planning for physical collection management.</li> </ul>	CoUL, SLFB

**4. Investigate and pursue expanded and new UC Libraries shared services**

Consider and identify opportunities to expand the UC Libraries shared services portfolio and the baseline of essential, systemwide library services and activities. At present, shared service opportunities that are connected to the SILS and reduce workload overall (i.e., service optimization and efficiency) should be prioritized.

*CoUL and DOC recognize and greatly appreciate the dedication and hard work of UC libraries staff, who continue to advance and improve our operationalization of the SILS, at the campus and systemwide levels. Standardization, where appropriate, and workflow redesign and realignment are ongoing activities of immense importance and value.*

**Relevant Long-Term Goals:**

- (3) Optimize and develop shared services for operational efficiency and maximal expertise

(5) Strengthen and reflect diversity, equity and inclusion in library operations, services and resources

Near Term Goal(s):	Group(s):
<ul style="list-style-type: none"> <li>Develop framework and applicable processes for defining, commissioning and decommissioning UC Libraries shared services.</li> </ul>	DOC
<ul style="list-style-type: none"> <li>Identify, evaluate and advance the reorientation of local activities into systemwide services, as enabled by the SILS (e.g., centralization of statistics reporting through the SILS Network Zone commenced in 2022/23 and will continue in 2023/24); consider and address workforce capacity, development, support and engagement needs. Shared service approaches might include centralized and decentralized services.</li> </ul>	DOC, SILS LG
<ul style="list-style-type: none"> <li>Initiate strategic visioning for UC Libraries shared services and collaborative priorities broadly, to create a medium-term (e.g., 10-year) roadmap.</li> </ul>	CoUL

**5. Further explore and evaluate artificial intelligence and machine learning (AI/ML) and systemwide opportunities**

Advance systemwide discussion and exploration of AI/ML as it relates to library work and opportunities to collaborate and advance shared priorities and services at the systemwide level.

**Relevant Long-Term Goals:**

- (3) Optimize and develop shared services for operational efficiency and maximal expertise
- (5) Strengthen and reflect diversity, equity and inclusion in library operations, services and resources

Near Term Goal(s):	Group(s):
<ul style="list-style-type: none"> <li>Set initial strategic direction and scope for UC Libraries exploration and evaluation of the role of AI/ML, its impact on library work practices and the opportunity to revise library services to account for AI/ML. Local/campus experiments and leadership in this space will inform systemwide conversations and shape shared capacity building.</li> </ul>	CoUL, DOC

**Abbreviations**

CoUL	Council of University Librarians
DOC	Direction and Oversight Committee
LEND	Project LEND
SILS	Systemwide Integrated Library System
SILS LG	SILS Leadership Group
SLFB	Shared Library Facilities Board
TRANSFORM	Project TRANSFORM