

Regional Library Facility (RLF) Long-Range Goals, Mid-Range Goals and Annual Priorities (2024/25)

Process, goals and priorities endorsed by the Shared Library Facilities Board (Sept. 19, 2024)

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Introduction

The [northern](#) and [southern](#) Regional Library Facilities (RLFs) preserve and provide access to the University's valued physical library collections of enduring scholarly importance, directly advancing the teaching, research and patient care of current and future generations of UC scholars. As primary cultural heritage repositories, the RLFs are also core to both national and global efforts to preserve human knowledge.

With a unified service environment and shared technical infrastructure, UC's high-density, climate-controlled storage facilities are designed and maintained to generate economies and efficiencies at scale. The RLFs play a longstanding and continuing role in enabling comprehensive and diverse library collection development across the system, and uniquely position UC leadership in print preservation, collective collection management (also referred to as "shared print"), mass digitization and new approaches to digital access. For further reflections on the role of the RLFs in systemwide success, please see the Shared Library Facilities Board (SLFB) 2023 visioning document, [The Regional Library Facilities \(RLFs\): Essential to core UC shared services & emerging innovations](#).

To support RLF strategic management and planning, the SLFB maintains long-range goals, mid-range goals and annual priorities that reflect the UC Libraries' operational objectives and advance the work and ambitions of UC faculty, students, researchers and clinicians, systemwide. The RLF goals and priorities also intersect with and augment [the UC Libraries long-range goals and annual priorities](#).

Long-range SLFB/RLF goals

1. Advance sustainable, persistent retention and preservation of valued scholarly materials on behalf of the University (faculty, students and researchers across UC), state of California and partners across the region, country and globe.
2. Expand equitable UC access to RLF collections.
3. Maximize space reclamation and optimization to best serve UC's local and systemwide needs.

FY24/25 Mid-range goals and annual priorities

Mid-range goals	FY24/25 priorities	Responsible	Target Timeframe ¹
1. Support and participate in the implementation of the RLF Operations Funding Project phase 2 recommendations	i. Revise SLFB’s charge and redefine the role and function of the board as the RLFs are administratively reimaged.	SLFB chair and vice chair, along with and CoUL Steering, to draft, consulting the current RLF directors; for CoUL and SLFB review and endorsement	Draft available for SLFB review by September 2024
	ii. Co-develop a new organizational framework for RLF systemwide management, to seek SLFB review, feedback and endorsement; to then be submitted to UCOP.	Subgroup, appointed by CoUL with SLFB members; consultation with and potentially representation from UCOP	Initial high-level concepts and structures for September; finalized by December 2024
	iii. Develop the FY2025/26 total RLF budget and begin to establish an SLFB budgetary oversight process to: Build and maintain systemwide understanding of and strategic planning for the systemwide RLF budget and implications at each host location; and ensure support for Phase 2 recommendations. Planning may include an outside consultant; process development will likely be multi-year and iterative.	CoUL and SLFB subteam	Budget for FY25/26 will need to be developed in fall 2024; initial annual process needs and approach to be developed by June 2025
2. Develop new/revised systemwide policies and guidelines governing deposits and allocations (implementing FY23/24 goal #2.iii deliverable - RLF Action Plan [Policy Changes])	i. Develop expanded, systemwide guidelines or framework for prioritizing persistent deposits to the RLFs to optimize what collections are deposited for systemwide use and maximize existing RLF capacity. Guidelines/framework should refine, but not be limited to, previous work of SPCMS on collection management decisions (i.e., what materials and collections are strategic to send to the RLFs).	Joint SCLG/SPST task force, charged by and consulting SLFB, consulting RLF operations experts	Task force charged by October 2024, to begin work in November 2024; initial consultation with SLFB in December 2024 and/or March 2025; final policies and guidelines by June 2025

¹ All timeframes assume the end of the month unless otherwise specified. For months when SLFB holds their regular meetings (March, June, September, December), responsible parties may seek SLFB review of deliverables, with the remainder of the month set aside for adjustments or refinements based on the board’s feedback.

Mid-range goals	FY24/25 priorities	Responsible	Target Timeframe ¹
	ii. Develop processes and workflows to support expanded, regular cross-regional deposits to the RLFs, reflecting capacity and service needs at both facilities. Recommend operational work plans, with lessons learned from the existing cross-regional deposit program, JACS, and the guidelines/framework for prioritizing persistent deposits to the RLFs (2.i, above) serving as inputs. This effort will enable additional work to expand cross-regional deposits; the additional, operational and strategy work will be carried out in 2026/2027 (to support likely implementation of further cross-regional deposits in 2027/2028).	RLF leaders and team members (consulting with campuses as needed), to propose to SLFB	Subgroup charged by March 2025; draft process / workflow(s) by June 2025, to be finalized by September 2025 (incorporating 2.i inputs)
	iii. Begin to develop a new strategic RLF allocation methodology, drawing on both the expanded, systemwide guidelines/framework for prioritizing persistent deposits to the RLFs (2.i, above) and the processes, workflows, and plans to operationalize the guidelines/framework (2.ii, above). Build in assessment opportunities for new methodology/methodologies pursued.	SCLG/SPST task force, with RLF representation (i.e., members from 2i and 2ii)	Begin planning and development in FY25/26, for implementation in FY26/27
3. Implement scoped projects to maximize RLF storage space in the short term and investigate opportunities to extend storage capacity timelines (implementing FY23/24 goal #2.iii deliverable - RLF Action Plan [Service & Operational Changes])	i. Initiate physical work for SRLF internal deduplication project to reclaim storage space and align SRLF collections with the long-standing non-duplication policy .	SRLF, consulting SCLG	Physical work to begin by January 2025 (this project will likely span 2-3 years)
	ii. In collaboration with UCSC, assess the outcomes of a scoped pilot project (run in FY23/24) removing targeted archival materials from NRLF and replacing with campus-identified materials at scale. Consider the feasibility of adopting this project at SRLF and expanding opportunities for more campuses to reassess what archival materials are housed in the RLFs.	NRLF and UCSC, consulting SRLF and SLFB Steering	By fall 2024
	iii. Develop a project plan for deduplicating SRLF collections against NRLF-held JACS and WEST shared print retention commitments, including both items for deaccession and items for contribution to fill gaps in the retained NRLF holdings. Consider impacts on SRLF and NRLF staffing needs and shipping solutions for contributions. Consider opportunities to explore new cross-IZ processing workflows.	SRLF, consulting NRLF, SCLG, SPST, SPOT, SLFB	Project plan to be developed by June 2025 (physical work to begin after completion of 3.i, above)

Parking lot for future goals and priorities

This parking lot includes potential and likely RLF goals and priorities that are anticipated but where implementation is not yet actively underway.

- Consider the feasibility of additional one-time and long-term projects to reclaim and/or maximize shelving space at the RLFs (see [RLF Action Plan](#) for projects to consider).
- Consider whether to further capitalize on RLF infrastructure and shared services to increase the proportion of annual allocations assigned to UC's special collections and archives over the next 2-4 years.
- Further explore and pursue cross-RLF efficiency and automation in light of Alma and CAIA (or any future successor shared system) functionality, including process and metadata management improvements to reduce workload related to accessioning and managing collections (*while a parking lot item, the RLF directors are asked to begin thinking and planning for this work item on behalf of SLFB, including how it should be prioritized and what this work would entail*)
 - Consider potential needs and opportunities regarding current and potential Alma Institution Zone and Network Zone configurations/implementations (or any future systemwide ILS)
- Ensure discovery of RLF collections is optimized systemwide in UC Library Search
- Expand systemwide, data-informed strategies for determining RLF deposits (potential opportunity to build on the outcomes of FY24/25 priority 2.i)
- Consider and integrate new digitized book service models (currently, the UC Libraries are researching technology, legal, user needs and collection considerations through [Project LEND \(Library Expansion of Networked Delivery\)](#))
- Potential opportunities to strategically expand mass digitization as it relates to our systemwide library facilities and access from these environments (e.g. HathiTrust (and UC HT ETAS), Google Books Project, Fed Doc Archives, etc.)
- Planning for additional RLF storage capacity (e.g., a new module); initiate planning five years before NRLF capacity is reached

Processes for establishing and managing SLFB/RLF goals and priorities

1. SLFB reviews and, as necessary, revises the SLFB/RLF long-range goals, mid-range goals and annual priorities document on an annual basis, typically in the summer (and updates as needed throughout the year).
2. Prior to each review, the SLFB Steering Committee consults with SLFB members and incorporates their feedback as draft revisions for discussion.
3. The final version is affirmed by the board and posted on the SLFB website