

Guidelines for Information-Sharing with Local Library Leadership Teams & DOC

CoUL members seek to keep their local library leadership teams and the Direction & Oversight Committee (DOC) informed about significant topics being discussed by CoUL, as well as critical decisions and actions. The council views this information-sharing and transparency as an important step in supporting shared leadership at the local and systemwide levels; it includes sharing information and context that is not posted to the CoUL page on the UC Libraries website. In many instances, CoUL members also need to consult with local leaders and experts on specific topics being discussed by the council; such local consultation is supported.

The following guidelines allow for flexibility and campus/CDL-specific implementation for applicable information-sharing and consultation. The guidelines do not apply to CoUL proxies, who by default are invited to attend CoUL meetings in their entirety and receive all applicable pre-reads and supporting documents. [See Guidelines for CoUL proxies attending council meetings.](#)

Content that is typically shared (in writing and/or verbally) with DOC and local library leadership teams:

- Action and decision items
- Endorsed/finalized documents
- Informational briefings (prepared for CoUL meetings and/or sent to the CoUL listserv)
- Informational briefings prepared by CoUL for UCOP or other systemwide committees
- Agenda items and topics being discussed by CoUL where local consultation is desired (with local leadership teams and/or other relevant staff); information-sharing with DOC/local leadership teams is desired; and/or when CoUL topics can support/advance local conversations

Content that typically is not shared:

- Confidential, in-camera discussions and documents¹
 - o Content specific to CoUL team building and council culture is not shared
- The individual comments and perspectives of CoUL members, unless permission to share has been granted
- Discussion items and draft documents that are still fluid/evolving and where local consultation is not yet required (*Note: Each member will determine whether local consultation is needed; with this guideline, the intention is to not engage local team members or DOC too early -- to avoid the need for repeated updates on topics still developing and the risk of leaders having quickly dated information*)

The CoUL representative to DOC may also choose to consult with the DOC Chair on updates to DOC.

With these guidelines, CoUL seeks to establish a shared baseline of understanding and knowledge with local leadership teams and DOC, and to support CoUL consultation with local experts. CoUL members will ensure that their local leaders/experts are appropriately briefed on the confidential nature of any documents/updates shared. CoUL commits to an annual check-in on information-sharing practices; these guidelines will be refined as needed to support CoUL's shared information-sharing and consultation goals.

¹ The CoUL Steering Committee will aim to mark applicable documents as confidential and not to be shared beyond CoUL members. Otherwise, documents can be considered appropriate for sharing with DOC, local leadership and experts, based on individual CoUL member judgement. Note: Such documents may still be confidential and inappropriate for broader sharing, beyond leadership teams/experts.