

Strategic SLF Allocation Methodology

Report and Recommendations

Endorsed by the Systemwide Library Facilities Board (SLFB) June 2026

Prepared by the Strategic SLF Allocation Methodology Task Force

Roger Smith, co-convener, SCLG chair, AUL for Scholarly Resources and Services, UCSD

Alison Wohlers, co-convener, SPST manager, Assistant Director for Shared Print, CDL

Tim Converse, SPST, Operations Manager, SLF-N

Carlo Medina, Operations Manager, SLF-S

Stacy McKenna, SPST, Assistant Department Head for Acquisitions, UCLA

Hannah Tashjian, SPST, Head of Preservation, UCB

Dave Schmitt, SPST & SCLG, Program Director, Collection Development and Management, UCSD

Jo Anne Newyear Ramirez, SCLG, AUL for Scholarly Resources, UCB

Tiffany Moxham, SCLG, Deputy University Librarian/AUL Content and Discovery, UCR

Bob Heyer-Gray, SCLG, Head of Collection Strategies Department, UCD

Table of contents

Executive summary	2
Recommendations	3
Foundation	4
Discussion of Recommendations	4
Appendix 1: SLF space use considerations	13
Appendix 2: Communication & socialization plan	14
Appendix 3: Translation between work unit and space metrics	17
Appendix 4: Workflow supporting resources	19
Appendix 5: Transition year timeline	28
Appendix 6: Nonpersistent deposits to the SLF over the past three years	29
Appendix 7: Datasets, reports, and pick-lists	30

Executive summary

Aligned with our [charge](#), the Strategic SLF Allocation Methodology (SSAM) Task Force proposes an innovative systemwide approach for strategically utilizing the annual allocation deposit capacity of the Systemwide Library Facilities (SLF). Underpinning the proposed approach is a commitment to shifting mindsets and associated practices from primarily local strategies to a systemwide strategy. Our proposal builds upon the concepts of persistence and the collective collection, harnesses the strength of our shared ILS, and will realize new efficiencies through collaboration.

A key component of strategically utilizing SLF space is a continued expansion of resources that support data-informed withdrawal of print collections. Deposit to the SLF cannot be used as a primary strategy for clearing space. Withdrawal, supported with systemwide reports and based on the existence of shared copies at the SLF and beyond, must be the first action taken to address campus space needs.

The majority (no less than 70%) of deposit capacity should be directed to persistent deposits - including both content explicitly identified as systemwide priorities, and more expansive content that is identified as eligible for persistent deposit according to the [Systemwide Persistent Deposit Collection Framework](#). The division of persistent deposits across the campuses shall be determined by local capacity for deposit and the presence of priority content in collections.

Smaller portions of deposit capacity should be available each year to support nonpersistent deposits (up to 10%) and critical campus needs (up to 20%). The latter does not replace the exceptional deposit workflow, but serves as a backstop when campus resources for exceptional deposits are simply not available. Any unallocated capacity in these two categories will be reallocated to the persistent deposit category.

The Task Force proposes that the Shared Print Strategy Team (SPST) is charged with executing the annual analysis and process for developing recommendations. The SPST will consult closely with the Shared Content Leadership Group (SCLG) in the development of recommendations. SPST and SCLG will be jointly responsible for submitting final recommendations for review and approval by the Systemwide Library Facilities Board (SLFB).

Proactive communication, socialization, assessment, and ongoing refinement are also essential pieces of the recommendations put forth by the Task Force.

Recommendations

Recommendation #1: Provide systemwide support for informed, confident withdrawal through on-demand analytics reports and annual pick lists.

Recommendation #2: Continue to leverage the work unit as the primary metric for tracking deposit allocation to the SLF.

Recommendation #3: Allocate no less than 70% of total available work units to persistent deposit pick-lists including systemwide priorities and overall eligible content.

Recommendation #4: Allocate up to 10% of total available work units to support nonpersistent (i.e., special collections, noncirculating content) deposits and deaccessions; limit deposits of archival boxes to 30% of this nonpersistent work unit allocation.

Recommendation #5: Allocate up to 20% of total available work units to critical, high-pressure campus needs centered on the reduction of their collection footprint, which without this support represent a risk of content loss.

Recommendation #6: Amend the Shared Print Strategy Team (SPST) charge to include the execution of the yearly process to arrive at allocation recommendations, with substantive and regular consultation with the Shared Content Leadership Group (SCLG). Charge both SPST and SCLG with reaching consensus on yearly allocation recommendations to advance to SLFB.

Recommendation #7: Send a pulse survey to campuses approximately in Spring 2027 to understand how implementation in FY27 Q3/4 is working. Continue pulse surveys or other assessment methods as recommended by SCLG and SPST.

Recommendation #8: Charge the SPST with coordinating and tracking an iterative communication and socialization plan to support the transition into and continued development of the new strategic SLF allocation methodology, with commitments from SLFB/CoUL and SCLG members to advance communication efforts at their campuses.

Foundation

In October 2025, SLFB charged the [Strategic SLF Allocation Methodology Task Force](#) to develop recommendations covering: (1) a new method for calculating the annual deposit allocation that leverages combined systemwide deposit capacity and cross-regional workflows to meet combined systemwide deposit needs; and (2) workflows and procedures for sustainable, centralized analysis enabling a systemwide approach for identifying materials for persistent deposit, to complement and support campus curator decisions.

The Task Force's recommendations build on preceding work to define [Systemwide Persistent Deposit Principles and Collection Framework](#).

Discussion of Recommendations

UC will leverage opportunities (SILS, shared print, digitization) and address challenges (budgets, staff capacity, physical space constraints) in the redesign of the annual deposit allocation to the SLF. We aim to harness strategic vision across the system and apply that vision to how we use the finite high density space and expert SLF staff capacity available to us. In order to build SLF collections that “support ongoing research and teaching, now and for future generations of scholarship,” we have to strategically identify collections for persistent deposit and radically rethink how we divide the deposit allocation. This will be accomplished not just according to the needs of individual campuses, but by a constellation of factors including systemwide priorities, our external partnerships, and campus capacity.

There are dependencies to consider and additional work that must be done with the systemwide collections analysis to enable several of the following recommendations. Nonetheless we offer a roadmap for transforming how UC Libraries best utilizes its resources in order to optimize use of the SLF.

Recommendation #1: Provide systemwide support for informed, confident withdrawal through on-demand analytics reports and annual pick lists.

Rationale: Campuses will continue to have immediate physical space demands that require downsizing on-site collections. Cultivating capacity and confidence in deselecting is key to shifting into a systemwide approach for prioritizing deposits to the SLF.

In recent years, there has been the beginning of an important mindset shift across campuses that has enabled withdrawal projects to replace some of the need for deposit to the SLF. This reflects a growing acceptance that the SLF persistent copy is sufficiently reliable and available, and campuses may not need to maintain their own duplicate copies (unless localized use demands it). This recommendation provides UC Libraries with an option to make informed decisions about whether to withdraw or retain locally.

Recommendation #2: Continue to leverage the work unit as the primary metric for tracking deposit allocation to the SLF.

The Task Force proposes the continuation of the work unit as the primary metric for tracking deposit allocation to the SLFs, with continued limitation on the amount of archival boxes that may be deposited as part of the allocation. The SLF can utilize Caia to determine % capacity and project fill rates/dates, and may subsequently recommend additional limitations by material type and/or size category.

Campuses wishing to deposit large amounts of nonprint or oversize materials should consult with SLFB and/or the SLF before such items are sent.

Maintaining the work unit as the metric for deposit allocation enables the SLF to reliably predict how many items it will receive for processing, which is essential to the sustainability of the SLF operation. Using an alternative metric based on shelf space used (such as linear feet or volume equivalence) would fundamentally undermine the SLF's ability to predict the amount of work needed to process the incoming deposits, creating an unsustainable operation considering the predetermined and limited resources available to the SLF. The work unit operates on the basis of *per item* processing. To understand capacity in more space-related terms like linear feet, please see [Appendix 3](#).

Additionally, using such an alternative metric would significantly complicate selection and deposit prep work at the campuses without much benefit compared with the proposed model. While such a metric could theoretically be used in tandem with the work unit with significant additional effort at both the campuses and the SLF, protection against premature shelf filling at the SLFs would still be largely (and more efficiently) accomplished with the proposed model, using a combination of (1) limitation on archival box deposits and (2) separate consideration, and possibly limitation, of other nonstandard deposits that require special storage needs of which there may be more limited capacity at the SLF. Please see [Appendix 1](#) for more information.

As the SLF work unit capacity is calculated on an annual basis, the Task Force also recommends retaining the practice of counting any work units sent to the SLF above a campus's annual allocation against the sending campus's allocation for the following fiscal year (i.e., as if the overage had been sent in July of the following fiscal year). Additionally, any campus allocation not used in the fiscal year for which it was allocated would be forfeited (work units cannot be banked year over year).

Recommendation #3: Allocate no less than 70% of total available work units to persistent deposit pick-lists including systemwide priorities and overall eligible content.

Rationale: This realigns our priorities to articulating and following systemwide collection strategies for intentionally building the collections at the SLF.

Through systemwide priority pick-lists, we seek to maximize SLF resources and campus impact by collaboratively identifying and taking action on *shared needs and challenges*. Pick-lists for eligible content create more flexible and scaled deposit capacity. While systemwide priority deposits require customized analyses, discussion, and shared decision-making, eligible deposits can be supported through repeatable workflows that generate expansive pick lists of eligible content based on the [systemwide principles and collection framework](#) for persistent deposits.

There is a critical mindset shift required in this portion of the allocation. We have to move from a sense of competition and scarcity, to a strategic division of labor based on capacity and the volume of eligible collections a campus has to contribute. The mindset shifts from "I need my quota to clear my shelves" to "I am contributing – through staff resources and content – to the UC's collective shared print collection." Campuses who are not allocated work units in this category can still be clearing shelf space based on withdrawal reports. Campuses who are allocated work units have the advantage of contributing directly to the collection that UC preserves in the long-term, but also hold an important responsibility to deposit efficiently so other campuses can deselect against content as they need to.

Expectations:

- SPST and SCLG will be responsible for working together to submit recommendations to SLFB for systemwide priorities and the distribution of capacity for eligible content
- Examples systemwide priorities may include rare/unique, expand digital access, expand digitization, contributing to shared print collaborations (JACS would fall into this category, as would commitments made on behalf of partnerships like WEST and HathiTrust)
- Distribution of allocation will be determined by data outcomes and ability to participate (who has the prioritized materials and staff capacity)

Recommendation #4: Allocate up to 10% of total available work units to support nonpersistent (i.e., special collections, noncirculating content) deposits and deaccessions; limit deposits of archival boxes to 30% of this nonpersistent work unit allocation.

Rationale: While special collections were originally deemed out of scope for the Task Force, a new allocation methodology must have some kind of placeholder for nonpersistent deposits, which are a current reality in the system. The Task Force arrived at 10% based on the average of nonpersistent deposits at the SLF over the last three years. Please see [Appendix 6](#) for more details. Any amount of this portion of the allocation that is not assigned is absorbed back into the persistent allocation pool described in recommendation #2.

Limiting campuses to send no more than 30% of their allocation for nonpersistent deposits as archival boxes (i.e., no more than 3% of deposits received at SLF would be archival boxes) matches the current practice of regulating the fill rate of SLF shelves by limiting archival box deposits. Please see [Appendix 1](#) for more information.

The Task Force makes this recommendation with the expectation this percentage may be amended after further SLFB decision-making around special collections and the SLF.

Recommendation #5: Allocate up to 20% of total available work units to critical, high-pressure campus needs centered on the reduction of their collection footprint, which without this support represent a risk of content loss.

Rationale: Most UC campuses have received unexpected and high-pressure mandates to clear library space of collections. The primary mechanism to address that need is exceptional deposits. This portion of regular allocation serves as a backstop to ensure that in cases where no funds or other resources exist for an exceptional deposit, the UC Libraries – as a system – are not at risk of losing content. Any amount of this portion of the allocation that is not assigned is absorbed back into the general allocation pool.

Definition: **A critical, high pressure campus need** is characterized by a mandate from University Campus or Library Administration that has a non-negotiable deadline and little to no special resourcing (which may include funding or alternative space on campus to stage collections).

Expectations:

- If campus resourcing is available, campus libraries will leverage the existing exceptional deposit pathway to partially or completely address urgent needs

- The University Librarian for the campus will submit a request to the SLF Director for urgent need, which will be considered by SPST and SCLG and then forwarded with recommendations to SLFB
- Requests follow the timeline of analysis and submitting recommendations to SLFB; if a request is made too late in the process, the request will be considered for the next allocation year
- Deposits made through this portion of the allocation shall follow the systemwide persistent deposit principles and collection framework
- Rare and unique circulating items that meet the criteria and guidelines of the systemwide persistent deposit collection framework should be prioritized

Recommendation #6: Amend the Shared Print Strategy Team (SPST) charge to include the execution of the yearly process to arrive at allocation recommendations, with substantive and regular consultation with the Shared Content Leadership Group (SCLG). Charge both SPST and SCLG with reaching consensus on yearly allocation recommendations to advance to SLFB.

Expectations:

- SCLG and SPST represent complementary and overlapping expertise that can effectively guide systemwide strategy for priority deposits and organizing eligible deposits
- SPST is responsible for the execution of the process to arrive at allocation recommendations, including regular consultation and final decision-making with SCLG (supported by one or more SPST members who are also SCLG members and designated as SCLG liaisons)
 - Proposed amendments to the SPST charge are outlined in [Appendix 4](#)
- The Shared Print Analyst staffs the SPST and is responsible for executing analysis, reports, and pick lists as directed by SPST to support the allocation methodology process
 - The Shared Print Analyst consults with an ad hoc group of metadata and analysis experts across the system as needed in service of executing their responsibilities
 - A brief charge or scope of work for the ad hoc analysis consulting group should be created and endorsed by SPST and SCLG following the approval of recommendations in this report

Approximate yearly timeline and major steps

IMPORTANT NOTE: It is anticipated that UC Libraries will be able to fall into a rhythm of identifying priorities and strategic approaches that are applicable for more than one fiscal year of allocation - lightening the analysis and decision-making load in some years and increasing predictability for campus deposit planning. The first and second years of implementing the new methodology may be characterized by a higher workload as norms are established. But one of the aims of shifting to the proposed allocation strategy is a reduction in overall workload for UC Libraries.

July to December -

1. As needed, SPST coordinates advance identification and evaluation of potential systemwide priorities for upcoming fiscal years
 - a. This period is not about in-depth analysis but understanding the shape of possible priorities and considerations associated with them
 - b. The workload associated with this period will be heavier in early years and should lighten as norms and priorities are established

January to February -

2. By the third week of January, SPST determines which systemwide priorities (which can change from year to year) to request summary data on
 - a. This step includes consultation with SCLG on which priorities to examine
 - b. As a matter of course, data on overall and per campus eligible collections is summarized at this stage
 - c. If a critical need has come forward, SPST may also request summary data to support understanding that need
3. By the end of February, the Analyst prepares the dataset and shares summary analyses with SPST
 - a. [Sample format for summary analyses from the Shared Print Analyst to the SPST and SCLG](#)

March -

4. By the fourth week of March, SPST identifies preliminary systemwide priorities for the coming fiscal year that will be included in the survey to campuses
 - a. This includes a step of consultation with SCLG to determine which priorities to include in the survey
5. By the end of March, SPST distributes a survey to campuses to gather information on capacity and priorities
 - a. This survey replaces the annual call for need that has historically informed the division of SLF allocation
 - b. The survey can help the SPST validate and/or narrow down systemwide priorities
 - c. [Sample format for survey to campuses](#)

April to May -

6. By the end of April, campuses complete the survey on capacity and priorities
7. By the end of May, SPST reviews survey inputs, synthesizes options, and – in partnership with SCLG – finalizes recommendations for allocation

- a. This step includes consultation with SLF leads on work unit capacity for the upcoming fiscal year and possible space limitations for certain material types or sizes
- b. Once finalized SPST requests the Analyst to create the resulting picklists

June to July -

- 8. By the June SLFB meeting, SPST and SCLG submit final recommendations to SLFB
 - a. This may result in iteration to respond to requests for edits from SLFB
 - b. [Sample format for recommendations to SLFB](#)
- 9. By the first week of July, SPST finalizes,¹ distributes, and publishes pick lists

The Transition Year

FY 2026-27 was recommended to be a transition year during which the allocation would be split into two six-month periods. In the first six months (July - December) allocation will follow historical processes. The second six months (January - June) is flagged to implement Strategic SLF Allocation Methodology recommendations. The timeline of work to support the transition year will be distinct from the recommended ongoing timeline. Please see [Appendix 5](#) for the full transition year timeline.

Escalation Pathway

If the SCLG and SPST are unable to come to consensus on recommendations, the group will frame those issues as decision points for SLFB to adjudicate.

Recommendation #7: Send a pulse survey to campuses in spring 2027 to understand how implementation in FY27 Q3/4 is working. Continue pulse surveys or other assessment methods as recommended by SCLG and SPST.

Audience

Allocation contacts with the assumption that those contacts will consult with appropriate staff at their campuses

Draft Pulse Survey Questions

This year marks the beginning of a new approach for identifying items for persistent deposit at the Systemwide Libraries Facilities. It relies on a strategy that utilizes lists for a) identifying items prioritized for SLF deposit and b) supporting withdrawal projects, thereby replacing the need for SLF deposit. Here is a short survey for you to provide feedback and help gauge this strategy's effectiveness in supporting the shift in mindset from "campus ownership" to a "One UC" collection vision.

- 1. Are there specific elements of the new principles and allocation methodology that need further clarification, explanation, or communication?
- 2. Are there any barriers creating delays or preventing you from meeting your allocation?

¹ This step includes updating the pick lists so any deposited materials from the last quarter of the closing fiscal year are accounted for. Includes withdrawal reports.

3. Is your campus library on target for dedicating your allocated work units to systemwide priority deposits?
4. Is your campus library on target for dedicating your allocated work units from pick lists of eligible content?
5. Has your campus used the provided withdrawal reports and/or pick lists (which identify SLF duplicates and out of scope content) to manage collections?
 - a. If so, approximately how many items have you withdrawn based on the reports and/or pick lists?
 - b. If you have not used the withdrawal reports or pick lists yet, are you planning to in the future?
 - c. How confident do you feel in the reliability of the withdrawal reports and/or pick lists?
6. Have you had—or do you expect to have—critical needs requiring deposits of material that do not meet the criteria for priority or eligible deposits?
7. Do you have any general comments to share?

Recommendation #8: Charge the SPST with coordinating and tracking an iterative communication and socialization plan to support the transition into and continued development of the new strategic SLF allocation methodology, with commitments from SLFB/CoUL and SCLG members to advance communication efforts at their campuses.

Aim

To develop a framework for a collective understanding and support of a UC shared collections vision from local scarcity to systemwide abundance and resource optimization.

Roles

- The group responsible for implementing the allocation methodology is also responsible for coordinating and tracking communication efforts (initiating systemwide communication; preparing and sharing resources for campuses to deploy locally)
- SLFB and CoUL members commit to supporting communication and socialization on their campuses with the partnership of their SCLG members

Core Talking Points

- Build awareness of the long-standing foundation of the [Persistence Policy \(2006\)](#) and [Non-duplication Policy \(2010\)](#)
- Build awareness of and socialize the [Systemwide Persistent Deposit Principles and Collection Framework \(2025\)](#)
 - Emphasize UL endorsement via the SLFB
 - SLF education (continue to raise awareness of the role and expertise of the SLF)

into collaborations such as WEST, ensures our limited storage space is filled with unique, rare, and high-value research materials.

- Efficiency through Centralized Analysis: Centralized reporting reduces the burden on local campus staff. We provide the 'pick lists,' allowing campus curators to focus on high-level collection strategy and access, rather than manual spreadsheet analysis.
- Strategic Preservation: framework prioritizing rare and unique items preservation

Additional communication and socialization resources are included in [Appendix 2](#).

Appendix 1: SLF space use considerations

While using the work unit as the metric for campus deposit allocations enables sustainability of new deposit processing operations at SLF, it does not account for the limitations of space available for various types and sizes of new deposits to SLF. For example:

- A single 12" x 40" x 18" wide shelf at SLF can, on average, fit 78 print monographs or 3 standard archival cartons. A deposit of 100 archival boxes will use much more of that type of shelf space than 100 print monographs, though both deposits use the same allocation of work units.
- Flat maps require special storage in cabinet drawers, and cannot be stored on shelves in the general stacks areas; the available drawer space is miniscule compared to the available general stacks shelf space, so SLF has available space for far fewer flat maps than for print monographs.

Prediction of fill rates at SLF is critical for understanding the nuanced limitations of the available spaces, which informs SLFB as to the expected urgency of need for additional space (i.e., construction of a new stacks phase) and/or the need to limit deposits of certain material types or sizes until more space can be created or made available.

Prior to fiscal year 2018-19, both SLF locations reported projections of fill rates based on the space remaining and the types of deposits received in recent prior years. Additionally, SLF-N (then NRLF) measured and reported deposit allocation by SLF space use (applying "volume equivalence" estimate formulas for different types of materials) rather than by work unit.

Since fiscal year 2018-19, in order to generally guard against faster-than-sustainable fill rates, campuses have been asked to limit their deposits of archival boxes (initially to no more than 10% of their work unit allocations, later adjusted to 3%). SLF has also reported specific limitations (e.g., SLF-S has no more capacity for print materials taller than 13").

SSAM supports continuing those practices in the short term, as articulated in the recommendations above. However, it also recognizes that a more robust system for governing space use of new deposits will likely become more necessary as available space continues to decrease at SLF, and encourages SLFB to consider charging a future task force with further investigation of this issue.

Appendix 2: Communication & socialization plan

Stakeholders, Concerns, additional talking points

Who	Concerns	Additional Talking Points
University Librarians	Campus autonomy. Local space. Differing knowledge in processes	Focus on “active teaching and research collections” while preserving unique/rare or systemwide used materials
Campus Curators / Strategists	Losing control over "their" collections.	Strategic Preservation Emphasis ability to curate core teaching and research collections. Maximize and expand collections through shared purchasing. Re-focus on services
Operations staff	Workflows	Centralized analysis Intentional and sustainable deposits
Faculty	Physical access	Expand access to key, well used collections and ability to collectively invest in high need areas. Access requests for SLF materials, regardless of location, are typically fulfilled in 1-2 business days.

Mindset Shift Talking Points

Old Mindset (Regional/Campus-Centric)	New Mindset (Strategic/Systemwide)
"I need my quota to clear my shelves."	"I am contributing to the UC's collective heritage."
"Is there room in SLF-S?"	"Where in the UC system is the best place for this?"
"We might need this copy someday."	"The UC has a persistent copy; I can repurpose my space."
Manual, local list-making.	Data-driven, centralized "pick lists."

From (The Old Status Quo)	To (The Shared Principles Mindset)
Campus-Owned: Items belong to a specific library.	Shared Assets: Items are stewarded for the whole UC.
Ad-Hoc Storage: Sending whatever is in the way.	Intentional Retention: Affirming long-term academic value.
Local Silos: "We need a copy just in case."	Collective Collection: Relying on shared print partners (WEST, HathiTrust) to reduce local duplication.
Physical Proximity: Value is based on shelf-distance.	Discovery & Access: Value is based on record accuracy and "frictionless" delivery across the system.

Allocation component clarifying statements

Allocation component	Clarifying statements
Systemwide priorities	"This component actively harnesses shared, collaborative decision-making to intentionally build the collection we want to preserve for the future in the SLF"
Eligible content	"The intention is to ease the burden on campuses of vetting content for deposit to the SLF" "Clarity around eligibility and who is depositing what can reduce unintentional duplicative work for both the campuses and SLF staff"
Critical needs	"This is not meant to replace requests for exceptional deposits" "Examples that fit this category might include a campus mandate to integrate another department into library space, loss of a building that houses library collections, natural disaster or building failure that puts collections at risk" "Examples that should still be routed through the exceptional deposits pathway might include a library decision to convert shelving space into study space, campus mandate that comes with sufficient funding to support exception deposit or other temporary storage options"
Direct deposit	"The new methodology will not preclude direct deposit of new acquisitions" "The aim with this category of material is to build more understanding around it over the initial years of the allocation methodology and consider whether there are opportunities to further align the work with systemwide priorities"
Nonpersistent	"This process recognizes that nonpersistent materials may represent a need from the campuses for SLF deposit. However this allocation methodology is intentionally focused on persistent deposits in support of the broadest

Allocation component	Clarifying statements
	possible enablement of local deaccessioning of redundant copies and therefore realization of space for other needs across our libraries" "Future SLFB work on the strategy for the SLF and nonpersistent deposits may result in changes to the percentage allocated to this content"

Appendix 3: Translation between work unit and space metrics

A “work unit” (WU) is defined as the amount of SLF staff time required to process a typical deposited item that is represented in Alma with a unique barcode and will circulate as a single unit. Each item deposited to SLF as part of the recommended allocation buckets is counted as 1 work unit of the allocation. The work unit is applied to all deposits processed at SLF, regardless of size or type, whether or not they are ultimately accepted and shelved in SLF, and whether or not they are processed for accession or deaccession. However, each work unit translates to a different average amount of library shelf space occupied depending on the item’s resource type. The table below may be useful for campuses to predict how much shelf space may be reclaimed locally by depositing different types of materials to SLF.

A “volume equivalent unit” (VE) is defined as the amount of shelf space occupied by a single typical print volume. The volume equivalent unit value assigned to a resource type is the amount of shelf space occupied by a unit of that resource type relative to that of a single typical print volume.

Shelf Space Use Conversions by Resource Type²

Resource Type	ASF per Work Unit	Work Units per ASF	Volume Equivalent
Print volumes	0.08000	12.5	1.00000
Pamphlets	0.00870	115.0	0.10870
Maps	0.04167	24.0	0.52083
Microfilm reels	0.02174	46.0	0.27174
Microfiche	0.00087	1150.0	0.01087
Other nonprint materials	0.01739	57.5	0.21739

Nonpersistent deposits often consist of manuscript and other archival materials housed in boxes, which in addition to ASF and VE may be counted in manuscript units.

Shelf Space Use Conversions by Container Type

Container Type	ASF per Work Unit	Work Units per ASF	Volume Equivalent	Manuscript Units
Record storage carton, 13 x 16 x 10.5 in.	0.75075	1.332	9.38438	1.0
Document box, 5.25 x 12.5 x 10.5 in.	0.30030	3.330	3.75375	0.4
Document half-box, 2.5 x 12.5 x 10.5 in.	0.15015	6.660	1.87688	0.2
Other, up to 500 cu. in.	0.15015	6.660	1.87688	0.2
Other, 501-1000 cu. in.	0.30030	3.330	3.75375	0.4
Other, 1001-2500 cu. in.	0.75075	1.332	9.38438	1.0

² See Salmon, Stephen R. (1977). [The University of California Libraries: A Plan for Development 1978-1988](#), 156-158.

Container Type	ASF per Work Unit	Work Units per ASF	Volume Equivalent	Manuscript Units
Other, over 2500 cu. in.	15.01502	0.666	18.76876	2.0

Appendix 4: Workflow supporting resources

SPST Charge Revisions

Note: Charge revisions are reflected in red text in the following copy of the SPST charge.

UC Libraries Advisory Structure
Direction & Oversight Committee

Shared Services Team Charge

1. Name

Shared Print Strategy Team (SPST)

2. Charged By

Council of University Librarians (CoUL)

3. Reporting Line

Direction & Oversight Committee (DOC)

5. Responsibilities

The Shared Print Strategy Team will develop and oversee the implementation and evaluation of strategies and directions for collaboration around print collections among UC Libraries and with extramural partners.

The Team's purview includes

- Collection development and management issues, activities, policies, and criteria for UC-wide and extramural shared print initiatives (in consultation with the Shared Content Leadership Group (SCLG), which has overall responsibility for shared collection development and management).
- (Add) Ongoing identification and evaluation of systemwide priorities for SLF allocation and responsibility for guiding the annual allocation process.
- Issues and policy development associated with tools, technologies, and standards that facilitate how shared print content is analyzed, selected, preserved, described, disclosed, discovered, and accessed.

6. Membership / Composition / Terms of Appointment

Members are selected for the expertise they possess or by virtue of their portfolios. An effort will be made for representation from a wide range of UC campuses, although desired expertise and/or portfolio are the chief criteria for selection. Members on the team who represent a specific expertise or portfolio are expected to actively represent or coordinate with UC colleagues and groups with similar expertise or portfolio, as needed. Subject specialists on the team represent a broad discipline and represent or coordinate with associated CKGs and possibly other subject specialists (for example, where a CKG might be lacking for a particular subject area) in the broad disciplines.

Appointed Members

- Three (3) Subject Specialists, respectively representing the perspectives of broad discipline areas, including:
 - Humanities
 - Social Sciences
 - Sciences
- Representative for Technical Services/Cataloging
- Representative for Preservation
- Representative for Public Services
- Two (2) AULs (or equivalent) for Collections

- Representatives from areas of emerging or increasing relevance for shared print (i.e. Digital Initiatives or Strategies)

Ex Officio Members

- California Digital Library Shared Print Manager
- California Digital Library Shared Print Analyst
- ~~(Replace) Representative for the RLFs (one or more of the directors or a delegate)-SLF Director~~
- Shared Print Operations Team Chair

Members may serve more than one appointed or ex officio role on the Team. ~~(Delete) (e.g. the RLF representative may also serve as the representative for preservation).~~

Members are recommended by DOC, SPST, or SCLG. Nominations or renewals should have the approval of the candidate's supervisor before being submitted for endorsement by DOC.

Members who serve on the committee for their functional expertise serve for three year staggered terms, with the possibility of renewal. Shared service managers (CDL, ~~(Replace) R~~SLF, and SPOT representatives) are ex officio members of the Team.

7. Roles: Team Manager, DOC Liaison, SCLG Liaison, Shared Print Operations Team, and Operations Chair

The Team Manager is the UC Shared Print Manager. Team Manager responsibilities include:

- long range planning;
- coordinating the explorations and projects of the Team on an ongoing basis;
- providing leadership for the Team and facilitating strategy and proposal development;
- setting the agendas for and with the Team; and
- select administrative and service-related functions.

The Team Manager may represent UC Libraries in regional, national, and international fora, conferences and committees, particularly for shared print. The Team Manager serves as the Shared Services Team liaison to the ~~(Replace) Shared Systemwide~~ Library Facilities Board. The Team Manager meets with SCLG on a quarterly or other mutually agreed-upon schedule to review and consult on shared collection development and management activities, issues, and future plans.

The DOC liaison is selected by DOC from among the Shared Print Strategy Team members who are also DOC members. DOC may also decide to appoint a new member to SPST to serve in the liaison role. The responsibilities of the DOC liaison are to communicate activities, requests, and proposals of the Shared Print Strategy Team to DOC; this does not preclude the Shared Print Strategy Team Manager communicating with DOC when appropriate as well. The DOC liaison is also responsible for reporting back to the Shared Print Strategy Team from DOC.

The SCLG liaison is selected by SCLG from among the Shared Print Strategy Team members who are also SCLG members. SCLG may also decide to appoint a new member to SPST to serve in the liaison role. The responsibilities of the SCLG liaison are to support two-way communication between SCLG and the Shared Print Strategy Team with respect to areas of mutual interest and responsibility and to ensure that SCLG strategies, policies, and perspectives are represented on the Shared Print Strategy Team and vice-versa.

The Shared Print Operations Team (SPOT) chair serves as an ex officio member of SPST. The SPOT chair supports reporting to SPST and continuity in conversations happening across the two teams.

8. Related Groups

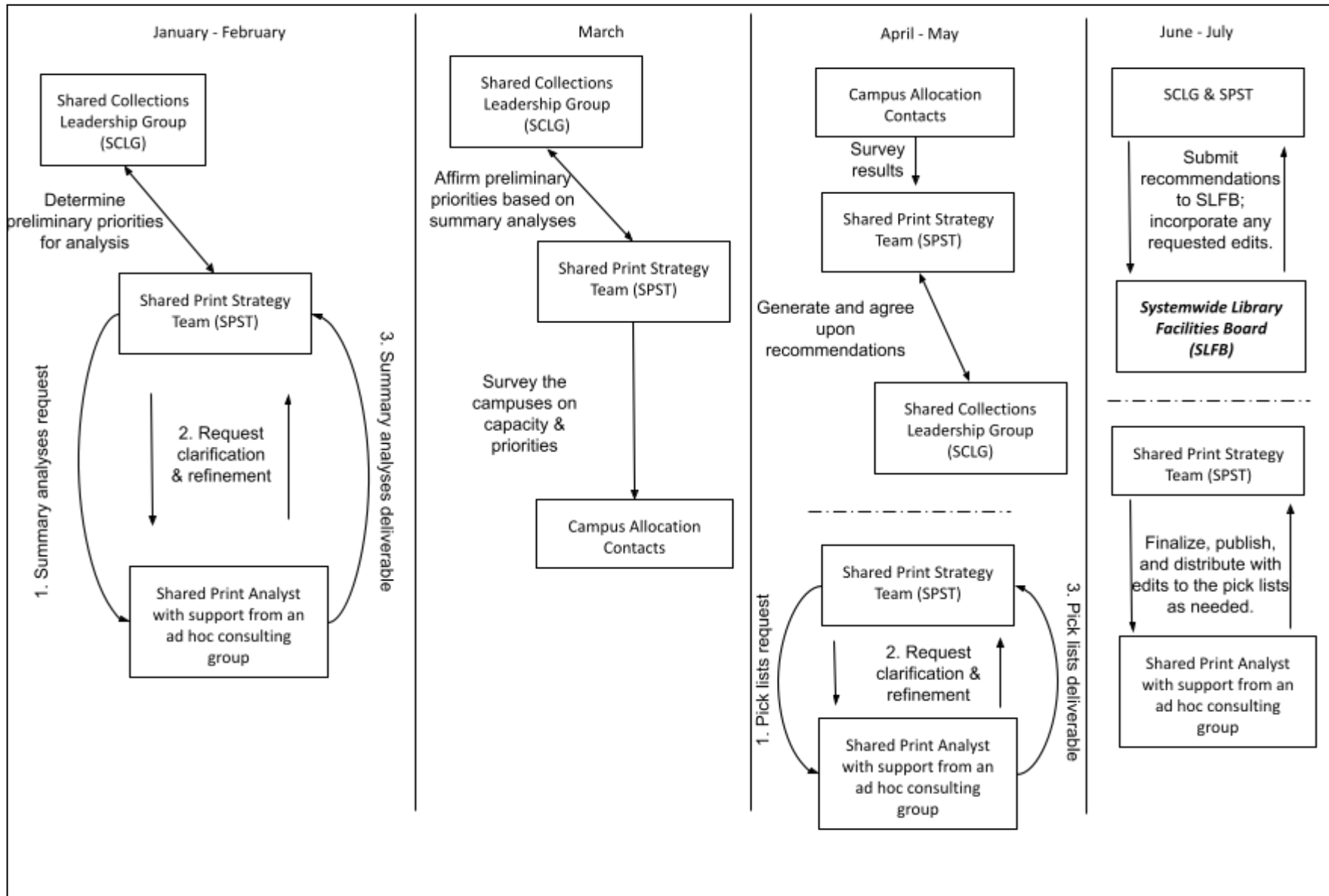
Beyond DOC and SCLG, SPST has connections to the following other UC groups:

- The Shared Print Operations Team (SPOT). SPOT supports the SPST in its strategic efforts and makes recommendations related to collaborative shared print activities. SPST may charge SPOT to explore feasibility of and to implement services.
- The SILS Leadership Group. SPST aims to consult with, get feedback from, and keep the SILS Leadership Group informed of any projects or services that may impact or require new approaches in the SILS (e.g. data access or custom reports).
 - An agreed upon consultation process between the SPST and the SILS Leadership Group shall be defined and documented outside of this charge.
- The ~~(Replace) Shared-Systemwide~~ Library Facility Board (SLFB). Because so much of UC's shared print initiatives depend on decision-making for the ~~(Replace) Regional-Systemwide~~ Library Facilities, the SPST Team Manager serves as a non-voting, ex officio member of the SLFB. The SPST Team Manager works with the ~~(Replace) RSLF Director~~~~(Delete)s~~ to submit key shared print updates or decisions related specifically to the ~~(Replace) RLFs~~SLFB and serves as an informational resource on shared print for the SLFB. ~~(Add) Annual allocation recommendations are made by SPST, in partnership with SCLG, directly to SLFB.~~
- ~~(Delete)-Any other ad hoc or temporary working groups with connections to collaborative action around print (e.g. the Systemwide Print Collection Management Strategy Working Group (SPCMS) - a temporary working group in which SPST has an explicit role).~~

9. Meetings and Team Communication

- The Shared Print Strategy Project Team will generally hold monthly meetings.
- The Shared Print Strategy Project Team will communicate among its members using the established SP-STRATEGY-TEAM-L mailing list.
- The Shared Print Strategy Project Team will manage meeting minutes and other documentation in a UCOP-hosted shared drive.

Workflow Visualization



Sample format for summary analyses from the Shared Print Analyst to the SPST and SCLG

Category	Subcategory	Total items	UCB total items	UCD total items	UCSF total items	UCSC total items	UCM total items	UCLA total items	UCSD total items	UCR total items	UCI total items	UCSB total items
Systemwide priorities	[priority 1]											
Systemwide priorities	[priority 2]											
Eligible content	N/A											
Critical Need	[request 1]											
Grand Total												

Considerations & Caveats

- ...
- ...
- ...

Sample format for survey to campuses

Recipients: Campus allocation contacts

Definition of an item: An item is represented in Alma with a unique barcode and will circulate as a single unit.

Definition of a critical need: A critical, high pressure campus need is characterized by a mandate from University Campus or Library Administration that has a non-negotiable deadline and little to no special resourcing (which may include funding or alternative space on campus to stage collections).

[insert summary analyses table and caveats]

Q1: Does your campus wish to deposit non-circulating or special collections during [fiscal year]?

If yes, Q1a: How many archival boxes does your campus wish to deposit during [fiscal year]?

If yes, Q1b: How many items (not in archival boxes) does your campus wish to deposit during [fiscal year]?

If yes, Q1c: Additional comments and context (if your deposits may include other formats like maps, microfiche, folios, etc., please share that here):

Q2: Is your campus directly depositing any acquisitions to the SLF during [fiscal year]?

If yes, Q2a: Approximately how many items?

If yes, Q2b: Additional comments and context:

Q3: Please estimate an item count your campus has the capacity to contribute from each category. Please see the summary analysis table [link] for information about your campus's item counts in each category.

Category	We would like to contribute approximately (item count)
Systemwide priority - [priority 1]	
Systemwide priority - [priority 2]	
Eligible content	

Q3a: Please tell us about any specific subject areas or LC/NLM call numbers of *eligible content* that you plan to contribute to the SLF persistent collections:

Q3b: Additional comments and context (if your deposits may include other formats like maps, microfiche, folios, etc., please share that here):

Q4: Please tell us about any areas of content your campus would like to see addressed via systemwide priorities for persistent deposit in the future:

Q5: Does your campus have a critical, high pressure need in [fiscal year]?

If yes, Q5a: Please describe in detail the context and approximate item count for your need.

Sample format for recommendations to SLFB

In [fiscal year] the SCLG and SPST selected the following systemwide priorities to strategically leverage persistent deposit capacity:

1. [priority 1 description]
2. [priority 2 description]

Campuses submitted information about their capacity and interests as summarized in table 3 at the bottom of this email.

After reviewing systemwide analyses and campus capacity and interest, SCLG and SPST recommend an overall division of allocation capacity as outlined in Table 1.

Table 1. Overall division of allocation capacity by category [fiscal year]

Category	Item Count	Percentage of Allocation
Systemwide Priorities - [priority 1]		
Systemwide Priorities - [priority 2]		
Eligible Content		
Direct persistent deposit from acquisition		
Persistent deposit from non-Alma affiliated library		
Critical Need		
Archival Boxes		
Other noncirc, Spec Coll		

SCLG and SPST recommend a division of allocation capacity per campus as reflected in Table 2. Rationale:

- ...
- ...
- ...

Table 2. Campus division of allocation capacity per category [fiscal year]

Campus	Systemwide Priority - [priority 1]	Systemwide Priority - [priority 2]	Eligible Content	Direct persistent deposit from acquisition	Persistent deposit from non-Alma affiliated library	Critical Need	Archival Boxes	Other Noncirc or Spec Coll Items (not in boxes)	Total per campus
UCB									

Campus	Systemwide Priority - [priority 1]	Systemwide Priority - [priority 2]	Eligible Content	Direct persistent deposit from acquisition	Persistent deposit from non-Alma affiliated library	Critical Need	Archival Boxes	Other Noncirc or Spec Coll Items (not in boxes)	Total per campus
UCD									
UCSF									
UCSC									
UCM									
UCLA									
UCSD									
UCR									
UCI									
UCSB									
Totals									

Table 3. Campus capacity and interest for contributing to persistent deposits in [fiscal year]

Campus	Systemwide Priority - [priority 1]	Systemwide Priority - [priority 2]	Eligible Content	Direct persistent deposit from acquisition	Persistent deposit from non-Alma affiliated library	Critical Need	Archival Boxes	Other Noncirc or Spec Coll Items (not in boxes)	Total per campus
UCB									
UCD									
UCSF									
UCSC									
UCM									
UCLA									
UCSD									

Campus	Systemwide Priority - [priority 1]	Systemwide Priority - [priority 2]	Eligible Content	Direct persistent deposit from acquisition	Persistent deposit from non-Alma affiliated library	Critical Need	Archival Boxes	Other Noncirc or Spec Coll Items (not in boxes)	Total per campus
UCR									
UCI									
UCSB									
Totals									

Appendix 5: Transition year timeline

Adapted Timeline

July to August -

1. Begin communication and socialization roll-out
2. By the third week of July, SPST determines which systemwide priorities (which can change from year to year) to request summary data on
 - a. This step includes consultation with SCLG on which priorities to examine
 - b. As a matter of course, data on overall and per campus eligible collections is summarized at this stage
 - c. If a critical need has come forward, SPST may also request summary data to support understanding that need
3. By the end of August, the the Analyst prepares the dataset and shares summary analyses with SPST
 - a. [Sample format for summary analyses from the Shared Print Analyst to the SPST and SCLG](#)

September -

4. By the fourth week of September, SPST identifies preliminary systemwide priorities for the coming fiscal year that will be included in the survey to campuses
 - a. This includes a step of consultation with SCLG to determine which priorities to include in the survey
5. By the end of September, SPST distributes a survey to campuses to gather information on capacity and priorities
 - a. This survey replaces the annual call for need that has historically informed the division of SLF allocation
 - b. The survey can help the SPST validate and/or narrow down systemwide priorities
 - c. [Sample format for survey to campuses](#)

October to November -

6. By the end of October, campuses complete the survey on capacity and priorities
7. By the end of November, SPST reviews survey inputs, synthesizes options, and – in partnership with SCLG – finalizes recommendations for allocation
 - a. Once finalized SPST requests the Analyst to create the resulting picklists

December to January -

8. By the December SLFB meeting, SPST and SCLG submit final recommendations to SLFB
 - a. This may include iteration to respond to requests for edits from SLFB
 - b. [Sample format for recommendations to SLFB](#)
9. By the first week of January, finalize,³ distribute, and publish pick lists

³ This step includes updating the pick lists so any deposited materials from the last quarter of the closing fiscal year are accounted for. Includes withdrawal reports.

Appendix 6: Nonpersistent deposits to the SLF over the past three years

SLF staff gathered information on nonpersistent deposits as a percentage of total allocation at each location over the last three fiscal years.

Nonpersistent deposits as % of total allocation

Campus	FY2023	FY2024	FY2025	Total
North	11.21%	15.37%	18.26%	14.82%
South	3.38%	7.62%	4.30%	5.10%
Total	7.68%	11.87%	11.11%	10.23%

The discrepancy between SLF-N and SLF-S is accounted for by UC Berkeley using an average of 21.2% of their allocation for nonpersistent deposits over the last three fiscal years.

Appendix 7: Datasets, reports, and pick-lists

Datasets

Refreshed on a yearly basis by the Shared Print Analyst unless otherwise decided by SPST and SCLG. Alma and external data are combined in a tool allowing for large-scale analysis and outputs.

Category	Source Data
Systemwide Priorities	Alma Analytics
Eligible Content	Alma Analytics
HathiTrust Digital Library	HathiTrust <i>Note: Will not be available in the first year.</i>
HathiTrust Shared Print Program Retentions	Shared Print Decision Suite (formerly AGUA) <i>Note: Will not be available in the first year.</i>
WEST Shared Print Retentions	Shared Print Decision Suite (formerly AGUA) <i>Note: Will not be available in the first year.</i>
Other Shared Print Retentions	Shared Print Decision Suite (formerly AGUA) <i>Note: Will not be available in the first year.</i>

Distinction between Serials and Monographs

The Shared Print Analyst will generate separate lists for serials and monographs based on the division of resource types created by the [Alma Annual Statistics Analytics Project Team \(AASA-PT\)](#).

Please note that duplication across serial and monograph lists may occur due the variable cataloging of multivolume sets or series. It is not in-scope – at least in initial implementation – for the Shared Print Analyst or SPST to account for those variable cataloging practices.

There may be further discussion in SPST and SCLG regarding which resources to include in the allocation reports and pick-lists, but if a resource is included it will be distinguished as a monograph or serial per the table below.

Resource Types defined as Volumes for UC Libraries/UCOP Annual Statistics reporting

Resource Type	Monograph/Serial	Notes
3D artifact	Monograph	Not all campuses define this Resource Type as a Volume
Atlas	Monograph	
Book	Monograph	
Braille Book	Monograph	
Braille Music	Monograph	
Braille Serial	Serial	

Resource Type	Monograph/Serial	Notes
Collection	Monograph	UC Berkeley does not define this Resource Type as a Volume
Journal (Ceased publication)	Serial	
Journal	Serial	
Kit	Monograph	Not all campuses define this Resource Type as a Volume
Mixed materials	Monograph	Not all campuses define this Resource Type as a Volume
Monographic component part	Monograph	
Music - Component Part	Monograph	
Newspaper (Ceased publication)	Serial	
Newspaper	Serial	
Manuscript	Monograph	
Manuscript - Component	Monograph	Not all campuses define this Resource Type as a Volume
Notated music	Monograph	
Other material	Monograph	Not all campuses define this Resource Type as a Volume
Other Serial (Ceased publication)	Serial	
Other Serial	Serial	
Serial component part	Serial	Not all campuses define this Resource Type as a Volume
Undefined	Monograph	
Unknown	Monograph	Not all campuses define this Resource Type as a Volume

Using Item and Holdings Data Fields in Reports and Pick-lists

Outputting item-specific fields will return item-level lists, which may be more difficult to use in cases where more than one item is on a title. Early implementation will involve further prototyping of both item-level and holdings-level lists to see what is most effective for users.

Standing Alma Withdrawal Reports

Withdrawal reports are set up and maintained by the Shared Print Analyst. Campuses may run the reports in their IZ and take action at any time. Please note that what follows is a starting place for criteria and output fields. Allocation workflows and analyses will need to be iterative and draw on feedback loops to continue to improve and refine.

SLF De-duplication - Campus Optional Withdrawal Reports

Criteria

1. Apply global filters per UCL Stats norms (e.g. exclude suppressed [bib and holdings level], lifecycle other than active, equipment [material type under item information])
2. Filter out SLF special collection location codes

3. Return matches for SLF holdings (involves creating a separate report of SLF holdings and filtering based on identifier)

Output Fields

- Resource Type
- Location Code
- Library Code
- Library Name
- Institution Code
- Institution Name
- Summary Holdings
- Retention Note
- Retention Reason
- Physical Condition
- Holdings Action Note (583 multiple subfields)
- ISSN
- ISBN
- MMS Id
- Network Id
- OCLC number (035a+z)
- OCLC number (035a)
- Title
- Language Code
- Publication Date
- Begin Publication Date
- End Publication Date
- Item Receiving Date
- Item Description
- Copy ID
- Num of Loans (Not in House) Last 5 Years
- Last Loan Date
- Call Number
- Normalized Call Number
- Author
- Barcode

Additional Work (implementation year 2 or later)

- Appending external (to Alma) data to the output fields, including the number of US Holdings in OCLC WorldCat, presence in HTDL, HTSPP retentions, WEST retentions, and other retentions

SLF Out of Scope - Campus Optional Withdrawal Reports

Criteria

1. Apply global filters per UCL Stats norms (e.g. exclude suppressed [bib and holdings level], lifecycle other than active, equipment [material type under item information])

2. Filter to items with specific 6XX field keywords; in year 1 of implementation choose a narrow set to pilot (e.g. “textbook”)

Output Fields

- Resource Type
- Location Code
- Library Code
- Library Name
- Institution Code
- Institution Name
- Summary Holdings
- Retention Note
- Retention Reason
- Physical Condition
- Holdings Action Note (583 multiple subfields)
- ISSN
- ISBN
- MMS Id
- Network Id
- OCLC number (035a+z)
- OCLC number (035a)
- Title
- Language Code
- Publication Date
- Begin Publication Date
- End Publication Date
- Item Receiving Date
- Item Description
- Copy ID
- Num of Loans (Not in House) Last 5 Years
- Last Loan Date
- Call Number
- Normalized Call Number
- Author
- Barcode

Additional Work (implementation year 2 or later)

- Appending external (to Alma) data to the output fields including the number of US Holdings in OCLC WorldCat, presence in HTDL, presence in the CRL textbook collection
- Evaluation of additional keywords to identify content in this category

Campus Pick-lists

The pick-lists are generated by the Shared Print Analyst when requested by SPST. Please note that what follows is a starting place for criteria and output fields. Allocation workflows and analyses will need to be iterative and draw on feedback loops to continue to improve and refine.

Withdrawal Candidate Lists

Criteria

1. Apply global filters per UCL Stats norms (e.g. exclude suppressed [bib and holdings level], lifecycle other than active, equipment [material type under item information]) AND
2. Filter out SLF special collection location codes AND
3. Return matches for SLF holdings (involves creating a separate report of SLF holdings and filtering based on identifier; used OCLC 035a+z to scope the SLF reference report) OR
4. Filter to items with specific 6XX field keywords; **in year 1 of implementation choose a narrow set to pilot (e.g. “textbook”)**

Output Fields (from Alma Analytics data source)

- Resource Type
- Location Code
- Library Code
- Library Name
- Institution Code
- Institution Name
- Summary Holdings
- Retention Note
- Retention Reason
- Physical Condition
- Holdings Action Note (583 multiple subfields)
- ISSN
- ISBN
- MMS Id
- Network Id
- OCLC number (035a+z)
- OCLC number (035a)
- Title
- Language Code
- Publication Date
- Begin Publication Date
- End Publication Date
- Item Receiving Date
- Item Description
- Copy ID
- Num of Loans (Not in House) Last 5 Years
- Last Loan Date
- Call Number
- Normalized Call Number
- Author
- Barcode

Output Fields (from HathiTrust and SPDS data sources) - *implementation of some or all of these fields may be delayed until after the first year*

- Count of OCLC US Holdings
- Retained by WEST (Y/N)
- Count of HathiTrust Shared Print retentions
- Count of other shared print retentions
- HTDL (PD, In-Copyright, or None)

Systemwide Priorities Candidate Lists

Criteria

- Varies by year

Output Fields (from Alma Analytics data source)

- Resource Type
- Location Code
- Library Code
- Library Name
- Institution Code
- Institution Name
- Summary Holdings
- Retention Note
- Retention Reason
- Physical Condition
- Holdings Action Note (583 multiple subfields)
- ISSN
- ISBN
- MMS Id
- Network Id
- OCLC number (035a+z)
- OCLC number (035a)
- Title
- Language Code
- Publication Date
- Begin Publication Date
- End Publication Date
- Item Receiving Date
- Item Description
- Copy ID
- Num of Loans (Not in House) Last 5 Years
- Last Loan Date
- Call Number
- Normalized Call Number
- Author
- Barcode
- Additional fields may be identified for specific priorities

Output Fields (from HathiTrust and SPDS data sources) - *implementation of some or all of these fields may be delayed until after the first year*

- Count of OCLC US Holdings
- Retained by WEST (Y/N)
- Count of HathiTrust Shared Print retentions
- Count of other shared print retentions
- HTDL (PD, In-Copyright, or None)
- Additional fields may be identified for specific priorities

Eligible Content Candidate Lists

Criteria

1. Apply global filters per UCL Stats norms (e.g. exclude suppressed [bib and holdings level], lifecycle other than active, equipment [material type under item information])

2. Filter out SLF special collection location codes
3. Filter out matches for SLF holdings (involves creating a separate report of SLF holdings and filtering based on identifier)

Output Fields (from Alma Analytics data source)

- Resource Type
- Location Code
- Library Code
- Library Name
- Institution Code
- Institution Name
- Summary Holdings
- Retention Note
- Retention Reason
- Physical Condition
- Holdings Action Note (583 multiple subfields)
- ISSN
- ISBN
- MMS Id
- Network Id
- OCLC number (035a+z)
- OCLC number (035a)
- Title
- Language Code
- Publication Date
- Begin Publication Date
- End Publication Date
- Item Receiving Date
- Item Description
- Copy ID
- Num of Loans (Not in House) Last 5 Years
- Last Loan Date
- Call Number
- Normalized Call Number
- Author
- Barcode

Output Fields (from HathiTrust and SPDS data sources) - *implementation of some or all of these fields may be delayed until after the first year*

- Count of OCLC US Holdings
- Retained by WEST (Y/N)
- Count of HathiTrust Shared Print retentions
- Count of other shared print retentions
- HTDL (PD, In-Copyright, or None)

Critical Need Candidate Lists

Whether critical need deposits are supported by pick-lists will depend on the circumstances and capacity.