

# California Digital Library Strategic Vision

## The Connect Process

### I. Purpose

The Connect process is a mechanism for creating alignment of CDL-wide activities around selected thematic clusters for the purpose of ensuring that the resources are expended efficiently and effectively to support CDL's strategic vision. Connect activities are designed to analyze, synchronize, improve and prioritize efforts within a given topic or service area. The process can be undertaken by ad hoc or standing groups.

### II. CDL Work Environment

The CDL is a multi-service, multi-project environment that is organizationally structured into primary programmatic areas; each CDL program has a director and assigned staff that may include analysts, product managers, programmers and others. Despite frequent collaboration amongst staff across the programs and regular communication across program leadership, programmatic boundaries can obscure a holistic view of the CDL service portfolio. There remains a need to understand the total effort expended by the entire organization within broad topic areas, e.g., open access, research data management, institutional repositories, collection development and discovery systems. The Connect process allows and encourages a review and consideration of efforts, projects and services across CDL programs that can only be achieved when a common, cross-programmatic analysis is performed.

### III. Potential Benefits and Intended Outcomes

- Build a holistic view of the CDL service portfolio within a given area, with a focus on service gaps, redundancies, interdependencies, user needs and emerging technologies.
- Understand and articulate total resources expended by CDL within a thematic area.
- Increase cross-programmatic awareness, planning and communication.

- Support and evolve CDL’s strategic vision through the prioritization of effort within and across programs.

## IV. Launching a Connect Group

The creation of a Connect Group should be considered when a cluster of CDL activities within a thematic area crosses CDL programs or service teams and CDL leadership or staff identify a need for alignment of these activities. The group may be appointed by CDL’s AVP/ED or Director’s Cabinet, or it may arise organically as a self-organized volunteer group. A charge outlining area of focus, membership, timeline and deliverables will be proposed by either Director’s Cabinet or others within CDL, and will be approved by the CDL AVP/ED before work commences. A sample of a Connect Group charge is provided below.

### Sample Connect Group Charge

#### OA Connect Task Force (July 2017)

##### I. Membership

List members

##### II. Charge

The OA Connect Task Force is being convened to perform a CDL-wide review of the organization’s current engagement in Open Access activities. By taking measure of the portfolio of CDL’s “investments” in OA, the task force will provide background for future conversations about strategic engagement and prioritization in this domain.

##### III. Timeline / Deliverables

- A. Description of the full portfolio of CDL’s investments in/engagement with Open Access. This description will outline, for each OA activity:
  - a. Description and scope of effort (CDL, nationwide, international, etc.)
  - b. Audience of OA investment: producers, end-users, others (e.g. UC libraries or librarians)
  - c. Other key stakeholders: other entities who have a key stake in the service or activity (e.g. who would have to be consulted if the activity were discontinued)

- d. Actual (to date) and desired impact
  - e. Challenges: ongoing challenges
  - f. Costs: licenses, FTE, and sources of funding
- B. An analysis of our current CDL OA portfolio, focused on examining:
- a. Goals
  - b. Resource allocation
  - c. Strategic alignment (or lack thereof) across the activities
  - d. Degree/nature of engagement with campuses
  - e. Opportunities to better synchronize our efforts
- C. Full report (with complete portfolio and analysis) will be presented to Cabinet MM/DD/YY.

#### **IV. Ongoing Work**

Following the completion of this work, the OA Connect Task Force will make a recommendation about whether or not a standing CDL OA Connect group should be established and, if so, what its membership and ongoing remit should be.