

Systemwide Licensing Orientation Video Transcript

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Welcome to this series of orientation videos about Systemwide licensing at the UC Libraries. My name is Ivy Anderson – I'm the Director of Collection Development and Management for the California Digital Library, or CDL.

As most of you know, CDL is a unit within the UC Office of the President that provides collaborative support for a broad range of shared library systems and services at UC. CDL was founded in 1997 specifically to advance Systemwide digital library initiatives and build value for the University through Systemwide collaboration. Collaborative licensing of online collections is one of these key initiatives and is the area covered by these videos.

This overview series was commissioned by the UC Libraries Collections Licensing Subgroup to introduce new UC library staff to key elements of UC's collaborative licensing workflow and decision process, and to acquaint you with the work that CDL performs to support the licensed resource life cycle, from selection and negotiation through licensing, acquisition, and ongoing management.

The staff in CDL work in close consultation with UC library Systemwide committees and with bibliographers and other librarians throughout the campuses to facilitate and support collaborative licensing activities across the UC Libraries. [Collaborative licensing creates significant value for UC by making available many more resources than any single campus could license on its own, producing millions of dollars in savings for the libraries.]

As of 2014, more than 66,000 ejournals, several hundred databases, and hundreds of thousands of ebooks are available at all UC campuses through systemwide collaboration. In this introduction, I'm going to describe the key committees that govern Systemwide licensing at UC, and introduce a few key concepts that inform how these activities are organized. The Collections Licensing Subgroup, or CLS, is the Systemwide committee that oversees shared licensing activities.

CLS considers and approves new Systemwide online resources, oversees multi-year agreements for journal and ebook packages, determines how costs are shared across the libraries (what we call 'co-investment'), and develops policies for shared online resources. CLS includes senior collection and acquisition managers from all ten campuses, plus CDL, who have the budgetary authority to approve licensed resource expenditures.

The Joint Steering Committee for Shared Collections, or JSC, is a CDL advisory committee comprised of both CLS members and selected campus bibliographers. JSC supports CDL in developing and preparing online resource proposals and draft policies and procedures for CLS consideration, as well as to advise CDL on collection expenditures from its own content budget - ensuring that our funds are spent wisely to the benefit of all UC campuses.

JSC membership balances large and small campuses and is designed to represent a range of

disciplinary expertise.

JSC manages an Annual Bibliographer Survey through which we request input from the UC bibliographer groups on new Systemwide resources to pursue.

Although we call this an annual survey, we do occasionally skip some years when budgets are tight.

A key concept is what we call the Tiered Approach to Licensing at UC.

Tier 1 licenses are Systemwide licenses for which CDL handles all phases of the process, including vendor negotiation, license signing, invoicing and payment, and ongoing management. These are the resources targeted by the Annual Bibliographer Survey.

Tier 2 licenses are shared licenses, typically involving eight or fewer campuses, that are organized by an individual UC campus, working directly with subject bibliographers across the campuses. CDL often handles invoices and campus recharges for tier 2 licenses, but is not responsible for negotiating these arrangements. The CDL website includes a Tier 2 toolkit that describes how to organize and manage Tier 2 resources.

Tier 3 licenses are licenses that are entered into independently by individual campuses. This tiered scheme offers a flexible approach to collaborative licensing and helps to identify who is responsible for a given license.

Finally, Collections Librarians groups across the UC Libraries – also known as subject bibliographer groups –are the foundation on which Systemwide collaboration rests.

These groups include subject collections librarians from all campuses. These groups work closely with JSC, and provide a reference for CDL and systemwide groups as needed. The video on Selection and Approval for Systemwide Licensing describes this process and the relationships between these groups in greater detail.

Last but definitely not least, Systemwide licensing activities are guided by policies and procedures that the libraries have developed over many years to encourage and cultivate best practices.

Key policies and procedures of note include:

- the UC Libraries' Principles for Acquiring and Licensing Information in Digital Formats;
- the UC Libraries E-Book Value Statement and related ebook workflow guidelines developed by CLS.
- Principles for co-investment in shared resources – that is, what share of a given license fee should be paid by each campus;
- Procedures for Managing Changes to Journal Packages

These and other policy and procedures are available from the CLS and CDL web site pages referenced on this slide.

The CLS, JSC, and CDL Licensing web pages are all important sources of information for licensing activities, policies, and procedures.

More information on current systemwide licensing activities can be found in the Collections Licensing Subgroup and Joint Steering Committees meeting minutes on their respective

websites.

Information on new resources and resource changes can be found on the CDLInfo website. More information about the CDL Licensed Collections group, including licensing guidelines and current activities, can always be found on the Licensed collections section of the CDL website.] You can also contact your campus representatives and committee liaisons to the bibliographer groups for updates about current activities.

I hope this short introduction has been helpful in providing you with some context for the more specific videos that follow, which cover the topics you see on this slide. Although the videos are listed in what we might call 'life-cycle' order, from selection and approval through ongoing management and evaluation, each is designed to be a short, self-contained module, and they can be viewed in any order.

Please feel free to contact any of us at CDL, or your CLS representative, at any time with additional questions, comments, or suggestions, and remember that all of us are here to serve you.