UC Libraries Shared Print Program Interim Road Map 2019-2020

At the end of 2019 and beginning of 2020, the UC Libraries Shared Print Program will undertake a full refresh of its strategic plan and road map. For the present, this interim road map is intended as a guide for moving intentionally through the next year and communicating out what is anticipated in the near future before a full refresh of the shared print strategic plan can be completed.

This interim road map is built on the foundations established in the 2013-2018 strategic plan and 2014-2018 road map, but also reflects updated environmental changes and near-term priorities.

Informed by:
UC Libraries Shared Print Program Strategic Plan 2013-2018
UC Libraries Shared Print Program Road Map for 2014-2018 (recommended activities to pursue)

Environmental Changes:
- **Status of RLF capacity.** The SRLF will be full in certain sizes in the next 2 to 6 years. NRLF 4 is anticipated to open in the second half of 2020 with a capacity of a little over 3 million volumes. Another module for SRLF is not anticipated.
- **State of campus deposit needs.** In the last two years, there have been three exceptional deposits approved (UC Davis to NRLF; UC Santa Barbara and UC Irvine to SRLF). Other campuses appear to be maintaining if not increasing their deposit activities.
- **CoUL Plans and Priorities for FY 2018-2019**
  - **Pursuit of systemwide library management systems.** CoUL has prioritized maximizing discovery of and access to information resources through investigation of a Systemwide Integrated Library System for the UC Libraries and implementation of an Inventory Management System for the RLFs. Adoption of systemwide tools has implications for our capabilities in UCL Shared Print and should be considered in the formation of our next strategic plan and road map.
- **Increasingly networked shared print opportunities** through extra-regional collaborations like the Rosemont Shared Print Alliance, the HathiTrust Shared Print Program, and the Partnership for Shared Book Collections.

Overarching Goals for UC Libraries Shared Print Program and Shared Collections[1]:

1. To facilitate the **development of more comprehensive and diverse research collections** available to UC library users throughout the system through efficient collaborative methods for the **prospective acquisition** of research resources.
2. To **accelerate the development of shared collections** to provide substantial opportunities for **campuses to avoid costs or to reallocate RLF and campus library space** for other uses.
3. To **integrate UC Shared Print collections** with broader regional, national and international shared collections.
4. To **preserve the scholarly printed record**, where print remains the archival medium of choice, **at the lowest possible unit cost**.
5. To ensure UC library **users can readily discover and access shared print collections** held within UC or by other libraries.
6. To **facilitate collaborative, holistic collection planning for physical resources** in conjunction with broader collection planning among UC Libraries.

Two broad strategies identified for pursuit between 2013 and 2018:

1. **Phased approach to space reclamation through print collaboration.** Implement a phased approach to space reclamation and development of a collective print collection, focusing on serials, monographs and federal documents.
2. **Cultivate policies and infrastructure to advance print collaboration.** Cultivate policies, services, resources and infrastructure to advance shared print collection development.

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[1] As stated in the [2013-2018 Strategic Plan](#), p. 2.

Projects or Policies	Status
Coordinated print serials archiving to the RLFs and a de-duplication service	Established JACS.[2] Now in its fourth year, basic workflows have solidified. The shared print teams are implementing improvements (i.e. new shipping provider, RLFs as JACS contributors, shifting the timeline to publish title lists to align with allocation requests).
Retrospective shared print monographs program	Selected participation in the HathiTrust Shared Print Program.
Coordinated digitization and print retention of State Documents	Remains an area for investigation.
Disclose UC Shared Print collections in union catalogs (OCLC WorldCat, CRL PAPR)	Successfully disclosed UCL Shared Print serial retentions. Published a UC Libraries Shared Print Disclosure Standard for Journals. Monograph disclosure is on hold pending OCLC capability improvements and/or a community-supported, shared open retention data registry for monographs.
Revise "persistence policy" to support extramural partnerships	Persistence Policy Revision Project Team progressed on this review in 2014/15; advised further investigation.[3]
Assess existing shared print projects and policies and make adjustments	JSTOR assessment took place in 2014, JACS in 2016, and SPLC[4] in 2016.

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[2] Journal Archiving Campaign Service, which was established in 2015.

[3] The Persistence Policy Revision Project Team had a number of goals in reviewing the Persistence Policy. Included in those goals was evaluation of how to make it possible for UC Libraries to deselect and/or contribute stored holdings to extramural partnerships while ensuring access to UC users, defining the relationship between finite retention periods and persistence, and providing guidance on how to reconcile various collection management behaviors that may apply to shared print materials stored in the RLFs. The Task Force concluded their investigations by outlining a series of key questions to guide further engagement with Collections AULs and CoUL to inform potential revisions. These questions will likely be a logical beginning for revisiting this topic in the future.

[4] Shared Print for Licensed Content (SPLC) was an initiative under which UC Libraries received one copy of each print journal issue for the titles licensed system-wide. Assessment of the SPLC initiative indicated that the need for acquiring print journal issues as a group effort appeared to be narrowing to just a few use cases. As a result, the initiative has since wound down. However, there is value in returning to the key findings of this assessment to scope potential prospective shared print goals for the next iteration of UCL's shared print strategic directions and roadmap.

2019-2020 Interim UCL Shared Print Road Map: Recommended Activities to Pursue

Activity	April-June 2019	July-Sept. 2019	Oct.-Dec. 2019	Jan.-Mar. 2020	April-June 2020
Assess JACS RLF workflows and de-duplication costs					
Assess JACS 1-4 title lists; facilitate in-system gap-filling and further consolidation		Shift into JACS 5 analysis			
Consider UCL Shared Print JSTOR collection status and opportunities, gather input on options					
Assess JACS shipping provider and, if found desirable, renew agreement					
Clarify and update documentation on the ownership and management of UCL Shared Print collections	Assess where clarification is needed; communication plan	UCL Shared Print Annual Statistics			
JACS 5 analysis and title selection (based on amended timeline)			List to be posted in January		
Explore and gather information related to UCL Shared Print coordinated participation in monograph programs[5]		Inputs for strategic planning			
Explore synergy and intersections with the UCL FedDocArc project for serials	Clarify areas of intersection				
UCL Shared Print Strategic Plan and Road Map full refresh			Report on shared print impact; set the stage for strategic planning		

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[5] Such as, HathiTrust, Statewide California Electronic Library Consortium (SCELC), and the Partnership for Shared Book Collections (PASBC).