

# California Digital Library

## Strategic Vision

*The California Digital Library (CDL) is a dynamic and ever-evolving organization, and our mission, vision, and values reflect our emerging outlook. This iteration of the CDL strategic vision is based on our most recent round of strategic planning.*

### WHAT IS OUR PURPOSE?

#### Our MISSION STATEMENT

The California Digital Library (CDL) provides transformative digital library services, grounded in campus partnerships and extended through external collaborations, that amplify the impact of the libraries, scholarship, and resources of the University of California.

### WHAT IS THE WORLD WE WANT TO CREATE?

#### Our NORTH STAR

The California Digital Library seeks to be a catalyst for deeply collaborative solutions providing a rich, intuitive and seamless environment for publishing, sharing and preserving our scholars' increasingly diverse outputs, as well as for acquiring and accessing information critical to the University's scholarly enterprise. Through CDL's commitment to sustainable open scholarship, an ever-wider range of freely available research informs ever-more potent responses to real-world challenges. Together with the UC campus Libraries and our other partners, we amplify the academy's capacity for innovation, knowledge creation and research breakthroughs and enable the University of California to produce a measurable impact valued by the state, the nation and the world.

The composition and activities of the University of California, its faculty and student body are purposefully interdisciplinary and international. We honor this diversity by working at the intersection of technology and values, enabling vibrant scholarly inquiry and discourse in the arts, humanities, sciences and professions. We know we have succeeded when our efforts support students, scholars and the public as they engage with the past, envision the future and grapple with the existential questions of the present.

While our endeavors are anchored in the teaching, research and public service mission of the University of California and its campus libraries, we continually strive to augment the University's capacity through strategic partnerships with the broader library community and other collaborators. In an environment of finite resources and rapid change, the collectives we form empower CDL and the UC Libraries to accelerate and fuel an expansive sense of what we can achieve. The university, its scholars and its

libraries thrive when we transcend organizational boundaries and commit ourselves to shared investments.

## WHAT DO WE STAND FOR?

### Our VALUES

At the California Digital Library, we are passionate in our belief that the library, in all its forms, is critically important to the vital work of students, scholars and the public.

- As a **library** we embrace the values of *memory, pluralism* and *unrestricted access*
- As a **public library** we embrace the values of *accountability, public service* and *social justice*
- As an **academic library** we embrace the values of *free discourse, nuance* and *context*
- As a **systemwide library** we embrace the values of *partnership, interdependence* and *common purpose*
- As a **digital library** we embrace the values of *innovation, collaboration* and *the power of the network*

## HOW DO WE ACT WITH INTEGRITY?

### Our WORK CULTURE

Our ambitions and values lead us to act in ways that honor the following principles:

- **Openness.** By recognizing the value of openness in all aspects of the scholarly enterprise, we respond to society's need for unfettered information access to confront the critical problems of today and tomorrow.
- **Diversity.** By proactively promoting and embracing diversity in the ideas, people and organizations with which we engage, we reflect UC's role in California, the nation, and the world.
- **User-centered design.** By placing the needs of stakeholders and users at the center of our analysis and design, we develop services and collections that are both useful and used.
- **Coalition-building.** By mobilizing the analytical and creative prowess of our community and engaging in collaborative problem-solving, we transform the way libraries and scholars work.
- **Adaptability.** By remaining critically responsive to changing environmental conditions and stakeholder needs, we remain relevant and provide sustainable value.
- **Agility.** By fostering a work environment that welcomes exploring new ideas through deliberate and iterative experimentation, we make room for a "think big, start small, move fast" approach to the problems we seek to solve.

- **Innovation.** At CDL's core is a simple idea – innovation through connecting up ideas, people and technology.

## HOW ARE WE CONNECTED TO OUR ENVIRONMENT?

### Our ROLE

Since its founding in 1997, CDL has been working in partnership with the UC libraries. Our perspective is informed by our home in the UC system, as well as the emerging national and international library network infrastructure. Our approach to problem solving and service development takes into account the common needs of all as well as the particular needs of individual UC campuses, and the context of services that operate above-the-system. From this unique central vantage point, our goal is to provide “equality of access to information, supported by appropriate business models, to all UC faculty and students, independent of time and place” (*A Framework for Planning and Strategic Initiatives*, October 1996).

As a **systemwide library**, CDL provides services to and on behalf of the UC system as a partner and collaborator to the UC campus libraries. The 11 UC Libraries are a coalition that makes shared choices based on the benefit to each organization and to the system as a whole. As a result of these choices, the UC Libraries have become increasingly interdependent: in areas of shared effort or common concern, decisions taken by any single library may affect any or all of its peers and need to be considered in that context. CDL's unique role as participant in and facilitator of shared commitments puts it at the nexus of the long-standing partnership among the UC Libraries. CDL strives to maximize the positive impact of shared efforts for the broadest possible set of our library stakeholders, and advocates for new opportunities to go further together. While we recognize that not all systemwide services and activities will equally benefit all 10 campus libraries, we affirm our determination to find the most sustainable and impactful coalition for each unique circumstance.

As a globally-connected **digital library**, CDL occupies a unique position between the local UC campuses and the global digital library infrastructure. CDL has the opportunity to benefit from global “network-level” services, and to transfer those benefits to the campuses, by fully incorporating them in our strategic thinking, portfolio and code. As more and more digital library services become part of this networked infrastructure, CDL continually assesses its relationship with these offerings, including commercial services. In some instances, CDL may adopt, extend, or collaborate on maturing collective infrastructure; in others, CDL may be uniquely positioned to contribute added-value network level-services to the digital library community, and shape the emerging ecosystem of these services. Our ongoing intellectual and financial investments in supra-institutional standards, infrastructure and organizations pay dividends when they build the UC Libraries' overall capacity and free up CDL and campus resources for other priorities.

CDL's activities are informed by a systemwide planning and consultative structure that includes the UC Libraries, Office of the President, as well as academic committees:

- CDL is a unit within the department of Academic Personnel and Programs, which sits within the Division of Academic Affairs at the UC Office of the President.
- CDL's Associate Vice Provost & Executive Director (AVP/ED) serves on the Council of University Librarians (CoUL), which provides collaborative leadership and strategic planning for the UC Libraries.
- The Systemwide Library and Scholarly Information Advisory Committee (SLASIAC) advises CDL, as well as the ten campus libraries, on systemwide policies, plans, programs and strategic priorities. Additionally, SLASIAC is charged with providing budget and planning oversight for the CDL. SLASIAC members represent a broad range of administrative, academic, technology, library as well as UC press leadership; it is chaired by a representative of the Council of Vice Chancellors, and reports to the UCOP Provost. CDL's AVP/ED serves as an ex-officio member of the committee.
- The University Committee on Library and Scholarly Communication (UCOLASC) is a committee of the UC Academic Senate, and advises the UC President concerning the administration of the University libraries. CDL's AVP/ED, as well as three CDL Directors, serve as consultants to the committee.

## ORGANIZATIONAL TRANSFORMATION AND PRIORITIZATION

### Our PATH

We recognize that we live at a time of rapid and accelerating change, which leads us to de-emphasize rigid long-term planning and emphasize more agile behaviors. Through our strategic vision process, we enhance CDL's ability to track new developments, assimilate them into our thinking, and continually adapt our day-to-day actions to changing realities. CDL currently maintains an extended portfolio of over twenty systemwide services in various stages of their life-cycle. As a result, we face a challenge typical of organizations with legacy systems: how to honor existing commitments and, at the same time, make space for critical new work.

To ensure that we are continually in alignment with what the moment asks of us and capable of discerning the merit, priority and resourcing for any given existing or new activity, we commit ourselves to an ongoing portfolio management process.

- We will assess all existing CDL services and initiatives by testing them against our vision and priorities, with the goal of identifying where we are on target and where we need to adapt or redirect our efforts.
- We will assess any new opportunities in light of our vision and priorities, with the goal of making deliberate and holistic decisions about new areas of effort.

- We will assess existing and potential CDL services in relationship to network-level infrastructure, as well as commercial solutions, with the goal of determining how, where and by whom these services can be most beneficially provisioned.

To support these portfolio management efforts, CDL will use a number of internal processes and guidelines, including:

- The new [CONNECT process \[PDF\]](#) to apply a portfolio evaluation and management approach to efforts where CDL's investment is distributed across multiple programs, with the goal of clearly defining our desired portfolio impact and aligning all activities around it.
- The new [EXPLORE process \[PDF\]](#) to surface, evaluate and make decisions on new projects, particularly those requiring cross-program buy-in and resourcing, with the goal of providing a clear and expedient path to execution of new projects with maximum impact for all of CDL.
- A new [Rubric \[PDF\]](#) to guide a constructive evaluation of existing services or new opportunities against our current priorities and CDL vision.
- A new [Guideline \[PDF\]](#) for assessing existing and potential CDL services in relationship to network-level infrastructure, as well as commercial solutions, with the goal of determining how, where and by whom these services can be most beneficially provisioned.

CDL's Director's Cabinet will be the forum for discussing relative prioritization across the range of CDL's existing and desired commitments, as well as resourcing for these activities, with the ultimate decision resting with CDL's AVP/ED. Whether an activity is cross-program or not, senior leadership will consider all of CDL's human and financial resources in allocating support to new priority activities. In other words, a new priority activity in any given program may be supported by resources from other programs.

While our vision emphasizes a renewed capacity to make foundational decisions in CDL's Director's Cabinet for the benefit of the organization as a whole, we also affirm that programs, as well as individual program staff, have the power and obligation to make decisions within their scope of work, tapping into their unique expertise and passion. We thrive as an organization when we balance empowering our organizational structure and empowering every CDL employee as a valued leader.

## Appendices

- [Service Evaluation Checklist \[PDF\]](#)
- [Connect Process \[PDF\]](#)
- [Explore Process and Proposal Form \[PDF\]](#)
- [Evaluation Against External Offerings \[PDF\]](#)
- [Future Trends \[PDF\]](#)