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Title

Phase 4 Harmonization Principles & Guidelines

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Introduction & Definitions

The mission of the Systemwide ILS (SILS) project is to transform library services and operations through innovation and collaboration. Harmonization is the process where the UC Libraries come together to align practices, procedures, policies and workflows where appropriate to best take advantage of the operational and service opportunities afforded through a SILS.

There are different options for harmonization:

- *Alignment / standardization* is practices, procedures, policies, and workflows being the same at multiple UC Libraries institutions.
- *Localization* is practices, procedures, policies and workflows being unique to individual UC institutions.

The principles below should guide the work of harmonization, helping to answer questions like “why should we standardize or localize?” and “what is the cost/benefit?”:

- 1) Should we align these practices? Why? Why not?
- 2) For the ones that should be aligned, how do we propose to do so? Why?

These principles and guidelines are based on the [SILS Phase 3 Principles](#). Harmonization is at the heart of the SILS principles and certain principles speak directly to the harmonization effort (see below.) These principles are abstract affirmations; harmonization is where we operationalize and act on the principles.

SILS phase 3 principle 1: The UC Library Collection is an integrated, shareable, user-centric collection that supports and enhances the mission of the University of California and whose strength is derived from the diverse nature of the individual campus library collections.

SILS phase 3 principle 8: We emphasize shared practices and policies that are appropriate and effective for the system. Rather than be bound by long-standing individual practices, we seek to collaborate to find new solutions that create success at a system level. We recognize that this project calls on us to be empathetic and flexible in finding common ground. All project participants will strive to balance local interests with systemwide goals.

Harmonization Principles

When deciding whether and how to harmonize, we will create outcomes that allow us to:

- 1. Prioritize the end user experience.**
 - a. End users should not have to become experts in the way staff are.
 - b. If someone has to experience complexity, can it be staff instead of patrons? Leverage staff expertise to allow patrons a shorter path.
 - c. We will reduce or eliminate barriers for patrons to discover, access, and effectively use our research collections

- i. Simplify and streamline user knowledge of and access to the UC Library Collection.
- ii. Communicate with words, and in ways, that users understand.

2. Simplify.

- a. Complexity is costly - proliferation of code, of special technical needs, of breakage points all require more staffing resources to maintain.
- b. Complexity can result in communication or training errors when reference staff are working with patrons.

3. Keep evolving: we will not be bound to long-standing practices and systems that are no longer useful.

- a. Build the freedom to experiment into our processes, and create a culture of comfort with reiteration.
- b. We will create a cycle of assessment to determine “usefulness.”
- c. Remember: future changes do not retroactively malign past decisions.
- d. Changes we make now are still beneficial even if changes are made again in the future. Future changes will be helped by incremental changes.

4. Strongly support unique needs.

- a. Recognize that the UC Libraries are different for good reasons and specialize in different things.
- b. Localization will be supported in a way that is still interoperable.
- c. Allow campuses to support user-oriented needs locally.
- d. Help campuses define and prioritize the local needs in relation to system needs.
- e. Shining a light on the unique collections can be accomplished through standardization or localization.

5. Enable data-driven decision making.

- a. Our data needs to be compatible / interoperable in order to make sense.
- b. We need to be measuring / capturing the same things.
- c. Understand and share definitions of what we are measuring in order to improve measurement.
- d. Understand what is impactful, why, and how we calculate that (as a system and locally).

6. Unify the experience for users of our general collections.

- a. If we have coherence, we can talk to each other across campuses with greater ease, support each other in a greater way, and find future common solutions with greater ease.
- b. Integrate our collections. The depth of our UC Library collection is built upon the strength of our individual collections.

7. Share the load.

- a. Don't reinvent the wheel; don't over-expend energy.
- b. Reduce unnecessary / problematic work.
- c. Stop doing some things altogether.
- d. Identify where there is value in doing it once for the consortium.
- e. Free up resources to spend on unique challenges and opportunities.