

COLLECTIVE, Abbreviated Feedback on Pre-Assembly Questions on CoUL Systemwide Plans & Priorities 2013-2016 Document

http://libraries.universityofcalifornia.edu/groups/files/coul/docs/UC_libraries_priorities_2013_final.pdf

4 Main Categories, Combined & Abbreviated by Board

1. Staffing, Library Workforce, and Professional Development/Skills

A. Major Themes

- High quality of library service requires adequate staffing levels throughout the system.
- Staff development is needed for all library staff (not exclusive to librarians)
- Tangible support is required (financial support, professional development support, expert training support, work release time support) to assess where expertise exists and to develop skills where needed.
- Systemwide commitment to diversity should be evidenced

B. Activities the UC library should stop:

- Using interim appointments and temporary librarians to accomplish work needed on a permanent basis
- Adding more responsibilities without dropping an equivalent amount.
- Proliferation of non-productive meetings

C. LAUC Role

- Develop a skill survey/inventory to evaluate system wide expertise and map it to systemwide goals
- Develop training program to grow expertise in needed areas.
- Engage LAUC with CoUL in goal-setting and priority-setting process
- Provide input on what areas would be best for shared services
- LAUC should re-consider requiring the MLIS degree for professional librarians, and through CAPA take a role in the evolving expectations of librarian responsibilities and in what constitutes "librarian" work.

2. Collections & Technical Services

Missing from document (Collections):

- Input from librarians as major stakeholders & recognition of librarian role in collection bldg./curation for all formats
- Need for staff training to achieve uniform licensing policies across tier 1, Tier 2 and Tier 3 resources
- Recognition that digital formats may not always be best
- Systemwide collection development of e-resources from unique or smaller publishers, including university presses, not included in major packages
- Systemwide mechanism for selecting and preserving copies in the best physical condition
- Use of purchasing in lieu of ILL as appropriate to build collections
- Timely responses from OCLC regarding Melvyl operation and development
- Influencing/shaping development of discovery tools
- Implications for infrastructure of systemwide vs. local digitization projects
- Recognition that individual campuses have special research areas, collections, needs and strengths
- Coordinate across UC to create content repositories (perhaps building on UCLA's Islandora/Drupal repository)

Highest priorities among those outlined in document (Collections):

- Maximize discovery of and access to information resources *in all formats* (not just digital)
- Continue to develop models for licensing e-books, including demand-driven models, that include the ability to share titles beyond UC (ILL)
- Harness power of UC to effect change in usability and vendor platforms
- Do not undervalue legacy collections

- Recognize that some user groups continue to prefer print
- Make Merritt a preservation repository and a discovery tool in support of maximizing discovery and accelerating the transition to a primarily digital environment

Priorities that are feasible within existing resources/staffing/expertise (Collections):

- Identify, gather and preserve cultural, scientific and scholarly heritage materials
- Continue to invest in development of WEST
- Maximize shelf space by removing journal runs duplicated on multiple campuses through systemwide collaboration as recommended by the SLASIAC Library Planning Task Force
- Spend more time/energy to make things more easily shared; spend less time/energy on things, such as Tier 3 subscriptions, that are difficult to share
- Determine how many copies are “enough” to provide long-term access to the scholarly record, even in a post-digitization environment

Priorities that are feasible with strong leadership (Collections):

- Transform collection development practices
- Maximize shelf space across campuses and at RLFs by implementing a shared print in place program
- Manage print collections on a systemwide basis to make maximum use of all available UC library facilities
- Reduce unnecessary duplication among the UC library collections by decreasing, as appropriate, overlap in library materials in all formats, de-duplicating the holdings of the RLFs, and exploring other strategies

Missing from document (Technical Services):

- Rights management
- Continued commitment to cataloging and maintaining print and older materials
- Improving and quickening resource description through semi-automated natural language harvesting and controlled vocabulary metadata generation with the goal of enhancing discovery and retrieval
- Understanding that significant work is required to downsize print collections

Priorities that are feasible (Technical Services):

- Digital preservation (may need skill development)
- Expand shared cataloging; decrease unique cataloging
- Focus cataloging function on quality control

Priorities that are feasible with strong leadership (Technical Services):

- Gather and revise existing resource-sharing policies across campuses to clarify which materials will be shared, under which terms and conditions

Priorities that are not feasible (Technical Services):

- Maximize digital library service capacities
- Maximize library processing efficiencies
- Activities UC libraries should stop performing in order to achieve stated priorities:
- Outsource some local technical services activities (cataloging, serials check-in and binding, etc.)
- Local physical processing of materials
- Local idiosyncratic cataloging of materials
- Acquisition of print serials when content is available electronically

Missing from document (Data Curation):

- Is data curation a systemwide or local activity?
- Guidance/support for students and faculty on data preservation and development of data management tools

Priorities that are feasible (Data Curation):

- Data curation/management (may need skill development)

Missing from document (Scholarly Communication):

- Acknowledgement of student aspect of scholarly communications

Highest priorities among those outlined in document (Scholarly Communication):

- Build services to underpin changing research, discovery and dissemination

- Expanded engagement in scholarly communications: sustainability, support of open access scholarly publishing, retention of intellectual property, achieve sustainable funding levels for collections, support vibrant research community with data management initiatives and innovation

Priorities that are feasible (Scholarly Communication):

- Assist and support faculty as they explore and use alternatives to traditional methods of scholarly publishing (may require additional staffing)
- Investigate most effective use of resources to support open access (may not be funding indiv. articles publication)

3. Leadership, Administration, and Funding

1. How can management be restructured, or communication/decision-making be improved? Librarians want more input, or to know their experiences and voices are being heard. How does new Advisory Structure play a role?

Supporting Points

- Stop locating decision-making at such far remove from experience.
- Principal issue isn't resources/staffing/expertise, it's leadership to achieve systemwide priorities.
- Stop clinging to legacy infrastructure and organizational structure when change is needed.
- Missing from document: Restructuring management paradigm to make it more efficient, inclusive, & cooperative.
- Next steps are prioritization and empowerment.
- Action plans and priorities are better developed from bottom up, by librarians who work on front lines, rather than top down. This conversation is a step in that direction, and we appreciate the opportunity.
- Research and planning needs to result in implementation.
- Goals/Priorities should be framed in light of proposed Advisory Structure (AS).
- Elaborate on LAUC's role in new advisory structure.
- Not feasible: All the systemwide collaborations in this document focus on front end of librarianship—collections, reference, instruction. Overlooks how we can collaborate on administrative overhead. Having fewer ULs & AULs might make it easier to make decisions across system, and make us more cohesive. Current administrative decision making structure isn't very agile. Document doesn't address how it will fix that.
- Stop pushing administrative work to service providers.
- Can LAUC have access to CoUL minutes?
- Set annual priorities (CoUL).

2. How can we improve collaboration and communication? How do we maximize our efficiencies and strengths to meet UC-wide needs and priorities? How do differences in campus practices, cultures and structures affect systemwide initiatives? How can (or should) we standardize?

Supporting Points

- In order to move forward with centralizing workload, there will need to be even more oversight and communication in creating "one UC" structure and greater standardization.
- Noted that we don't have enough of a uniform culture to really discuss this.
- Challenges noted include lack of uniform culture across UC and unwillingness to consider sacred cows or revisit traditions of library service.
- In order to make systemwide initiatives work, we need more standardization across campuses. Examples include our websites, ILS systems, etc.
- Articulate our shared assumptions.
- How do we communicate these priorities across UC libraries and outside the libraries?
- We need ULs to help us craft our message across UC system.
- Create better tools for systemwide documentation & communication (example, Confluence wiki).
- More communication, openness, and transparency across campuses.
- Less formal communication (not necessary to write a formal report when wiki or similar would communicate needed information more quickly).
- Missing from document: More collaboration among UC's, beyond the digital. Sharing print, expertise, resources, seeking out efficiencies. Non-duplication.

- (Highest Priorities) Multi-campus collaboration would be helpful for all goals/priorities described.
- Not feasible: There is no systemwide group for people outside bibliographers. We're trying to restructure and create new positions across the system, with no support built in. How will it be planned and implemented?
- We need to build collaboration from beginning, from both top-down and bottom-up.
- Not feasible: There will likely be variety among individuals & campuses regarding feasibility of individual priorities & goals. Sharing strengths among campuses will help fill gaps.
- Systemwide, continue to seek opportunities for efficiency & sharing, e.g. HOPS report on learning objects.
- Analyze activities we do repeatedly & identify efficiencies within.
- Reduce number of meetings & committees, both at local campus level, UC systemwide, and within LAUC.
- Mention what are shared services vs. what should campuses be doing individually?
- This is Systemwide Plan & Priorities for all campuses, yet there are significant differences among us. Since this is a vision document, not an implementation one, we should phrase this concern in a way to inform CoUL of inherent differences among campuses.
- Systemwide or local? "Centers of excellence": Local or virtual? (There are only semi-formal agreements).

3. How will we fund new initiatives? How will funding concerns impact cross-campus projects? Does LAUC have a role in funding issues?

Supporting Points

- May have already cut as much as we can. May not be possible to give up more to accommodate new priorities.
- Librarian Steele clarified that the priorities adopted are done so with an understanding of feasibility and costs.
- Lacks commitment to develop systemwide funding mechanisms.
- Some ideas mentioned in this document, like shared instruction services, can't be implemented without technology & resources, which aren't mentioned at all in this document. If those services aren't a priority for local campuses, and don't get support, how will systemwide work happen?
- Missing from document: Systemwide or local? Endowments, sustainability: Funds raised locally stay local. What happens on less well-endowed campuses?
- While there is a lot of emphasis on centralizing work, there isn't any description of whether resources will be provided so these initiatives can be successful.
- IT infrastructure vital to success of each of priority. Therefore, cuts to campus IT budget have profound impact on UCSC where IT services are centrally managed.
- Missing from document: How these initiatives & goals would be paid for (state funding, grant money, other?).
- Missing from document: Recognition that systemwide activities require systemwide funding.
- Missing from document: Advocacy for increased lib funding to reverse effects of attrition on services & workforce.
- Urge CoUL to address and respond to recommendations for financial infrastructure for these priorities.
- Align R&PD funding of research proposals with CoUL goals (LAUC).

4. How can we assess our progress? Are we setting priorities and making decisions based on meaningful data? Do we have concrete, measurable goals?

Supporting Points

- Missing from document: Assessment! (There is a commitment to being data-driven, but not to building assessment capacity.)
- How will we measure/assess our progress toward achieving these goals? If this vision document doesn't include references to benchmarks (e.g., "...to cut in half the ILL wait time by 2016"), where will such details be described?
- Lacks discussion of assessment and evaluation, mechanism to assess progress, results, etc.
- Question provides an opportunity for broader discussions, like how to solicit information from patrons about their priorities for services.
- Important to constantly reevaluate procedures to make time for new tasks.
- Stop collecting unnecessary statistics. Collection of statistics should be more meaningful and timely.
- Can an effective method of collecting good data systemwide be established?
- Create ongoing commitment to assess and review progress on all goals during the 3 years.
- Lacks implementation plan – timeline, outcomes, assessment.
- Lack of strategies to meet listed goals.
- Lacks clarity on how generalities play out on the ground.

5. What is CDL's role in the UC, and how do LAUC librarians better collaborate with, communicate with and advise CDL on their work? Are there changes that should be made in how CDL work affects librarians' time and priorities?

Supporting Points

- Systemwide or local? What part will local campuses be doing with workflow from CDL down? (ex. systems work for CDL takes precedence over local needs and processes).
- Who sets CDL priorities? CDL will be integral to many of these priorities, but the process to get something done by CDL is unclear. Why do they go big in data curation, but not instructional services? Will their role change to accommodate these systemwide initiatives?
- There is no mention of CDL by name—should there be?
- CDL is part of UC System, but is a service provider as opposed to an individual campus. Nevertheless, 50% or more of document is about CDL's projects. There's disconnect between CDL and individual librarians in terms of actively promoting and utilizing CDL products. Although some effort has been made on campus level, systemwide plans are needed to fill the gap.
 - Emphasis on CDL is partly because of document's intended audience.
 - ULs are negotiating what projects CDL takes on, and what would be the relationship of the projects with campuses. ULs are aware of challenge to retain connection between CDL and campuses who implement CDL's products.
 - With many things changing overtime, it is also challenging to keep focus on projects approved in the past.
 - No institution can overcome digital resources issues without some help from collaborative/cooperative activities like CDL. To survive, thrive, and embrace the changing environment, it makes sense to have many CDL projects in the document.
 - Training and leveraging are important to make the presented priorities, especially those CDL-related projects, more feasible. Also need to consider how to deal with additional tasks from CDL with limited number of staff.
 - More communication needed to integrate what CDL products offer into librarians' expertise.

4. Public Services, Technology, and Space

Technology

- Commit to keeping hardware & software up-to-date.
- Make improvements to ILL software & systems, in addition to revising resource-sharing policies.
- Standardize authentication system for accessing online resources.
- Increase accessibility of information resources for all users.
- Prioritize Goal #2 *Capitalize on technological opportunities to accelerate transition to a primarily digital environment.* (3 mentions) Become business and technology incubators. The interconnectedness of systems we use (UC-wide and national/international) are paramount to supporting all priorities in the document.
- Standardize technology implementation across campuses, e.g., wired classrooms.
- Adopt simpler & more user-friendly public-facing technology services (e.g. printing and scanning).
- Develop mobile apps collaboratively across UCs, but personalize for local needs, where possible and appropriate.
- Capitalize on technology initiatives that can be accommodated by current staffing levels.
- Explore potential next steps in systemwide collaborations to develop online learning objects.
- Make improvements to Melvyl. (2 mentions)
- Implement cross-platform searching.
- Use effective communication tools for accomplishing our goals.
- Hire library staff with developer & systems experience. Spread those skills to others.
- Train library staff on database management.
- Support personal service in addition to technology. Use technology only when it's appropriate.

Reference & Instruction

- Address how we will provide subject-specific e-reference across UC system.
- Contribute to enhancements of "Ask a Librarian" service.
- Evaluate librarian staffing on reference desks, potentially discontinue reference desk hours or reduce librarian time on desks during slow periods, based on analysis of usage data and local needs.

- Share key materials and learning objects systemwide (guides, how-to instructions, instructional materials and other tools) to reduce duplication of effort. Initial design process should assume systemwide audience and collaboration in mind. (Note: role exists here for new advisory structure to encourage more collaborative relationship between campuses.)
- Partner with faculty & other campus entities to improve student critical thinking & research
- Invest in ability of librarians to develop, implement, and troubleshoot technology tools utilized by our users (examples given were electronic health records and specialized software, but extends to other tools). Work to understanding research methods & needs of researchers
- Develop strategic ways to teach (inverted classroom) & convey information effectively in engaging way for users.
- Teach more via video, less in-person (more time/effort up front, long-term payoff).
- Create cohorts of instruction specialists for basic information literacy classes; bibliographers teaching subject-specialized classes.
- Integrate a required computer-assisted information literacy classes into university curriculum.
- Publicize UC workshops on eScience, data curation and such, to both library staff and our users as appropriate. Develop a central 'repository' of such workshops and trainings.
- Participate in online education at the local and systemwide level, using a variety of platforms.
- Support new modes of research that are more data- driven, including data and information management.
- Educate users and promote the array of existing resources available to them, including textbook-related issues, state mandates and open access issues.

Space

- Optimize/repurpose library space with input from librarians, include analysis of what spaces will be used for, prior to embarking on reductions.
- Consolidate service points where possible
- Whenever possible and appropriate, acquire digital formats for materials added to UC library collections

SUPPLEMENTAL INFORMATION

5 Questions Asked for Membership Comment:

1. What's missing from the document that LAUC feels is important to address/include?
2. What does LAUC feel are the highest priorities among those outlined in the document? Include rationale for your selections.
3. Drawing on LAUC members' operational experience and perspectives, which of the priorities listed in the document are feasible/practical with UC's existing resources/staffing/expertise?
4. Which activities should the UC library stop performing in order to accommodate or achieve the stated priorities?
5. What concrete next steps or action items related to the document and its contents should LAUC undertake following the Assembly or should LAUC recommend to CoUL?

Summary of CoUL Goals 2013-2016 in document:

1. Enrich systemwide library collection.
2. Capitalize on technological opportunities to accelerate transition to a primarily digital environment.
3. Maximize discovery of & access to information resources.
4. Optimize & repurpose physical library space.
5. Expand engagement in scholarly communication.
6. Build & leverage expertise.

ABBREVIATING ASSIGNMENTS

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