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June 10, 2013

Virginia Steel
Convenor, Council of University Librarians
University of California

Re: LAUC Advisory Statement to CoUL on Systemwide Plan & Priorities 2013-16

Dear Ginny,

On behalf of LAUC, I am forwarding the advisory statement prepared by the LAUC membership through divisional meetings in March, 2013, refined and finalized during discussion in the afternoon of the LAUC Assembly on May 20, 2013. LAUC members welcomed the opportunity to review and provide feedback to CoUL regarding the future of the UC Libraries. Also included in the statement are links to documents for additional background information about our conversations.

Thank you for supplying the impetus for an important collaborative process open to all LAUC librarians at a time of many challenges facing UC Libraries. Working together improves the outcome for all constituencies in the years ahead.

Should CoUL have any questions, please to not hesitate to contact us. LAUC welcomes feedback or comment.

Sincerely,

A handwritten signature in black ink, appearing to read "Keri S. Botello".

Keri S. Botello
LAUC President, 2012-13

Cc: Joanne Miller, UCOP
LAUC Executive Board + Divisions

Subject: Re: LAUC Advisory Statement to CoUL on Systemwide Plan & Priorities, 2013-16

From: Ginny Steel <vsteel@ucsc.edu>

Date: 6/10/2013 3:48 PM

To: "Keri S. Botello" <kbotello@ucla.edu>

CC: Joanne Miller <Joanne.Miller@ucop.edu>, "LAUCEXBD-L@LISTSERV.UCOP.EDU" <LAUCEXBD-L@listserv.ucop.edu>

Dear Keri,

Many thanks to you and your LAUC colleagues for these documents. We will include these in the packet of materials distributed to CoUL for our June meeting, and they will be helpful in stimulating our thinking as we begin discussions about the next round of revisions to the CoUL Plan and Priorities.

Thanks again,
Ginny

On Mon, Jun 10, 2013 at 3:35 PM, Kerl S. Botello <kbotello@ucla.edu> wrote:

Dear Ginny,

LAUC thanks CoUL for the invitation to comment on the plan and priorities for the UC Libraries.

Attached are two documents: a cover letter and the Advisory Statement document.

Please do not hesitate to ask any questions you may have, or provide feedback to us. We look forward to continued communication.

Kerl Botello
LAUC President, 2012-13

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LAUC Advisory Statement to CoUL on Systemwide Plan & Priorities 2013-2016

TO: Council of University Librarians (CoUL)
FROM: Respectfully submitted by LAUC Systemwide Executive Board, on behalf of LAUC Systemwide Membership
DATE: June 12, 2013

RELATED DOCUMENTS:

- CoUL's *Systemwide Plan & Priorities, 2013-2016*
http://libraries.universityofcalifornia.edu/groups/files/coul/docs/UC_libraries_priorities_2013_final.pdf
- Comprehensive, initial feedback from Divisions & Board
<http://lauc2013assembly.weebly.com/assembly-documents.html>

Background:

Believing in the importance of CoUL's *Systemwide Plan & Priorities, FY 2013-16* as a guide for the future of the UC Library, the 2012-2013 LAUC Executive Board discussed the document in support of its advisory role. The Board also encouraged and facilitated extensive discussions of the document, focused on the following questions, across all LAUC divisions, in order to elicit a librarian-level perspective on the *Plan & Priorities*.

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?
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?

The Board then consolidated divisional feedback and developed a more focused list of questions in the following 7 topical areas to guide small group discussion at the Assembly.

1. Staffing, Library Workforce, and Professional Development/Skills
2. Collections & Scholarly Communication
3. Technical Services & Data Curation
4. Leadership, Assessment, and Funding
5. Collaboration, Communication, and CDL
6. Technology
7. Public Services & Space

Each group ultimately shared 3 comments they felt most strongly should be communicated to CoUL, which were then used to craft this abbreviated advisory statement. These comments are also reprinted in their original form at the end of this document. Despite this document's brevity, LAUC members were deeply engaged in the activities that led to its formation. Several broad themes emerged from the Assembly discussions: Collaboration, communication, standardization, assessment, collection building, diversity, and librarian skills & training. The Board's intention is to offer a companion document to complement CoUL's priorities and to illustrate some ways in which LAUC and its members can support and advance them.

Introduction:

During the 2013-2016 time period, UC will have the opportunity to develop mechanisms to retool its workforce, streamline or standardize its operations, and meaningfully build and possibly cull its collections, for organizational efficiency, on-going innovation, and continued exceptional service to current and future library users. Realizing these opportunities may

require significant collaboration within LAUC and across the UC Library, and a new level of communication between CoUL and LAUC and the complete UC Library workforce.

A. Communication & Collaboration

LAUC's divisional discussions throughout Winter and Spring 2013 stressed the need for more effective communication across and within UC libraries, both on current activities and those yet to come. Digital library projects and data curation, among others, were mentioned as specific examples of initiatives for which improved communication is needed.

Additionally, to inform cross-campus understanding and inform local planning, greater promotion of initiatives and operations working well at each campus should be more heavily promoted across the UC Library. Conversely, challenges that might be remedied by enhanced cooperation and professional collaboration should be identified and addressed.

Another component of communication is that of identifying where problematic or unnecessary differences exist in policies, procedures, and practices across UC libraries and working to unify these wherever appropriate or useful. Standardizing loan periods is one example that could lead to greater operational efficiency and/or ease of understanding and using library services for patrons (in this case, related to resource sharing).

Unnecessary duplication of effort across UC libraries should also be addressed. As one example, LAUC members at each campus invest substantial time and resources creating topical and course-specific research guides and learning tools. Doing so is not only labor intensive, but often redundant. While CDL currently hosts a sharing service for such resources, deposit to it is cumbersome and the service is not well known. LAUC members support creation of a new, robust, easily accessible repository for systemwide deposit of learning objects and instructional resources such as guides, training material, instructional aides, webinars, videos, etc. for re-use or modification by librarians UC-wide for instructing users, themselves, and/or library colleagues.

Specific suggestions for realizing these communication-related objectives include:

1. CoUL clarifying and better communicating with UC librarians regarding its *Plan & Priorities*.
2. CoUL clarifying expectations and responsibilities of Strategic Action Groups and LAUC's representation on them.
3. CoUL ensuring that the Strategic Action Groups also represent Affiliated Librarians.
4. LAUC clarifying expectations of local executive boards, given the wide variety in their activities across UC libraries depending, in part, on the division's chair.
5. CoUL establishing and documenting an assessment plan/metric through which progress toward fulfilling its *Plan & Priorities* will be measured and communicated to LAUC (and others) annually.
6. Improving cooperation and communication between local librarians and local IT units, between library and campus IT units, and across the UC Library's IT units, proactively seeking opportunities for mutually beneficial collaboration.
7. LAUC taking a lead in sharing tools (print & digital learning tools, websites, services, policies, practices, assessment measures, etc.) across UC libraries to reduce redundancies, and increase training and awareness of systemwide resources.
8. CoUL creating Common Knowledge Groups (CKGs) to include functional areas such as instruction & technology tools.
9. LAUC (or others) identifying opportunities to standardize local practices across campuses in various functional areas.

B. Librarian Skills & Training and Diversity in the Profession

UC librarians recognize the importance in a rapidly changing environment of continuing professional development to acquire new skills. It's imperative that the UC Library enable its librarians to sustain high-quality library services across the system well into the future. Doing so requires a systemwide commitment to continually enhancing librarian skill sets in growing and emerging areas of librarianship, including ever-evolving learning technologies, as well as in more traditional librarian roles such as instruction and reference. Developing a dynamic, flexible, highly skilled, and forward-thinking workforce requires not only providing opportunities for librarians to develop new skills, but

also to put them into practice. Building greater diversity among UC librarians will also play a key role in helping the library profession continue to thrive and to meet the needs of UC's faculty, staff, and students.

One suggestion for facilitating professional growth in emerging areas among librarians could be for CoUL to allocate additional Research & Professional Development funds to support research or training in areas identified within CoUL's *Plan & Priorities*. While any such funding should remain independent from LAUC R&PD funding, one option could be for LAUC R&PD committees to use their existing processes for reviewing proposals and allocating any additional funds earmarked for that purpose using guidelines developed collaboratively between CoUL and LAUC.

New types of technology skills will also be necessary for advancing the librarian profession and helping UC librarians support their user communities. Some librarians may possess the needed skills and may be able to share their experience and expertise on technologies such as database management and programming with UC colleagues, though hiring IT specialists in these fields may prove a more practical path for ensuring these skills are consistently taught widely across the UC libraries.

Because of LAUC's particularly keen interest in Goal #6 ("build & leverage expertise"), this may be the area in which LAUC might ultimately be most heavily involved. LAUC welcomes CoUL to actively enlist direct librarian participation from across all professional areas in the process of "reevaluating and redefining the roles of librarians in the evolving information environment."

In support of these training-related goals, LAUC is in a position to take a lead role with:

1. Identifying and advocating for staff development needs, including education and training in digitization, data curation, scholarly communication, open access, eResearch tools, and more.
2. Promoting professional development opportunities across campuses.
3. Investigating and advocating for short-term, cross-campus internships to increase skill development in both traditional and emerging areas of library practice.
4. Advocating for increased professional development support for librarians.
5. Exploring and advocating for efforts to further diversity within the library profession and across UC's librarian workforce.
6. Exploring or expanding diversity programs available on local campuses and considering their application across the UC Library.

C. Collection Building

While librarians continue to stress the importance of substantial, mindfully curated library collections, librarians also support greater collaboration within UC's collection building efforts, thoughtful deduplication of collections across UC, the pursuit of efficient and effective resource sharing among UC libraries, and systematic collaboration with faculty and students in identifying collecting methods and priorities.

Suggested strategies for achieving these collections-related goals include:

1. Enhancing collaboration and communication with deans, faculty, research offices, and other stakeholders to build collections of local UC scholarship.
2. Librarians developing roles with research and grant offices to more fully understand the types of research being conducted by faculty.
3. Defining the role and value of the librarian in supporting Open Access and emphasizing the importance of gaining practical experience with Open Access tools.
4. Offering faculty workshops on copyright and fair use to support Open Access efforts.
5. Supporting and exploring use of non-standard metrics (also known as altmetrics).
6. Leveraging collections systemwide through better discovery tools.
7. Investing in facilities to better use existing physical space (for example, decreasing unnecessarily duplicative items, while increasing cultural heritage materials).
8. Committing to building resources and the capacity to support and deliver collections, including physical space, digital storage, technology standards, and other infrastructure.
9. Increasing and improving resource sharing across UC libraries, including increased lending of media and special collections items and standardization of associated policies.

10. Advocating in license negotiations for the ability to loan e-books outside UC in a manner analogous to the lending of physical books.

D. Technology

Finally, technology, broadly defined, encompasses all that we do and directly impacts both library users and staff. To succeed, the UC Library will need to continue to leverage technology effectively. Ensuring the ability for librarians to access the programs and resources needed to accomplish their work, wherever they are working, is essential. Unfettered access to enterprise software for library staff and to licensed resources for users is also imperative.

Selected strategies for ensuring effective technology across UC libraries include:

1. Implementing central/single sign-on authentication.
2. Ensuring access to appropriate technology and relevant IT training for librarians at all levels.
3. Facilitating access to technology-related tutorials and templates for use systemwide.
4. Ensuring that librarians and information technologists understand each others' roles, and are able to easily communicate and collaborate in support of the library's work.

Conclusion:

In this advisory statement, LAUC outlines just a few possible strategies for realizing CoUL's *Plan & Priorities*, along with identifying some areas in which LAUC might play an active role. We encourage CoUL to consider these and other roles for LAUC as we move forward. LAUC members have a deep interest and stake in the future of the UC Library, are passionate about their work, and eager to expand their skill sets to ensure their own value for and relevance to library users, as well as for the library as a whole. LAUC strongly encourages CoUL to take full advantage both individually and collectively of LAUC librarians' invaluable knowledge and experience and to continue to engage them in developing future priorities and in operationalizing current ones.

Last revised: 6/5/13

Top 3 Comments Made at Assembly within Each Breakout Group

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

- A. LAUC takes lead role in identifying and advocating for staff development needs as well as promoting opportunities across campuses.
- B. LAUC can identify opportunities to standardize local practices across campuses in all functional areas.
- C. Explore/expand diversity programs available on local campuses to larger UC.

2: Collections & Scholarly Communication

- A. Enhance collaboration and communication with deans, faculty, research offices and other shareholders to build our collections of local UC scholarship.
- B. Define the role and value of the librarian in supporting Open Access and emphasize the importance of gaining practical experience with Open Access tools.
- C. Commit to building resources and the capacity to support and deliver collections including physical space, digital storage, technology standards and other infrastructure.

3: Technical Services & Data Curation

- A. Advocate for education and training in digitization work and for better communication within UC regarding digital library projects.
- B. Advocate for increased resource sharing among the campuses.
- C. Advocate for cross-campus internships to increase skill development in data curation/management.

4: Leadership, Assessment, and Funding

- A. Representation: LAUC should clarify expectations and responsibilities of SAG and statewide reps. Also, LAUC should clarify expectations of local executive boards -- lots of variety in what they do across the state and depending on the chair. SAGS also will need to represent the Affiliated Librarians.
- B. Funding: Systemwide CoUL plan and priorities should be clarified to membership and CoUL might want to provide additional R&PD funds to support research (or professional development) to facilitate growth in these areas. LAUC research committees could allocate those additional funds along the same lines as local funding, but LAUC R&PD funding should remain independent of systemwide CoUL priorities.
- C. Assessment: We recommend that an assessment metric be developed by CoUL which is communicated out to membership, SAGS, etc. in which progress towards fulfilling the *Systemwide Plan & Priorities* is communicated out to LAUC annually.
- D. Diversity: We didn't see a commitment to mentorship and diversity in the *Systemwide Plan & Priorities* which we think is essential to us to survive as a profession.

5: Collaboration, Communication, and CDL

- A. Surface problems that need and can be solved to benefit of all campuses.
- B. Identify an ideal communication tool for telecommunication.
- C. Promote things that are working well at each campus.

6: Technology

- A. Central authentication for log-ins.
- B. Technology and relevant IT training for librarians at all levels and tutorials/templates that can be used systemwide , rather than each library or each library department reinventing the wheel each time.
- C. Collaboration/cooperation with IT departments on campus.

7: Public Services & Space

- A. LAUC should take the lead in sharing tools (learning tools, websites, services) among UCs to reduce redundancies, and increase training and awareness of systemwide resources.
- B. LAUC should make it a priority to ensure training of all librarians on eResearch tools in the next 2-3 years.
- C. LAUC recommends creating Common Knowledge Groups (CKGs) to include functional areas such as instruction & technology tools.