Context for planning

For many years, academic libraries have faced constant transformation. In the coming years, change will only accelerate and libraries will be affected on progressively more fundamental levels. Preparing for the many possible futures is a primary task for all library professionals and library administrators. It is work that must be done with librarians from other universities, with library consortiums and associations, with researchers, publishers and university leaders, to name just a few of the most important partners involved in scholarly communication, learning and research. Indeed, the interdependence of the needs and plans for such a diverse set of groups makes planning for an individual library difficult; and the numerous possibilities of the future make it intimidating.

At the heart of our planning forecast must be the uncertain nature of scholarly communication. It is clear that the dishearteningly regular increases in materials costs (in all formats) and the possibilities for better communication inherent in new technologies, combined with growing awareness of open access issues (such as the recent NIH grant requirement for open access) will result in some important changes in the way research is created, made accessible and preserved.

However, that future will not arrive tomorrow, and it will not come in a tidy and coherent package. In the meantime, we must continue to provide the essential programs that are necessary for the ongoing success of students and faculty. Providing access to content is primary among these services. For now that means finding ways to afford access to content that is more expensive every year. The difficulty of meeting such budgetary demands makes it imperative that all players work together to provide more affordable and robust methods of scholarly communication. Until that day comes however, we must find ways to use the resources we have to maximum effect.

There is no question that an increase in the library materials budget will make our efforts easier – but still difficult since even libraries with larger budgets face the same relentless onslaught. One budget source is increased funding from the university. We must demonstrate to the university the importance of our contributions and the compelling nature of our needs. We must also increase our efforts at producing additional funding through development and grants.

However, our most important task is to put the resources we do have, and any we may garner in the future, in the right place. This planning process has identified a number of areas of emphasis that we must enhance. In order to move and maximize our resources, we have attempted to identify areas we could reduce or abandon. That effort is not over and we must return to the critical work of restructuring the reach of our thinly stretched net.

Branch libraries

The A2P2 process was based on the notion that no institution can do everything that is possible and that it is important to focus on priorities. There is no question that the processes, services and other efforts we engage in have value. Indeed we all have ideas of stretching our services to cover more programs or even introducing new ones. However, given the available resources and the reality of the economic climate, we cannot contemplate any of these opportunities without trimming current efforts.

In this context, the A2P2 committee recommended that the four branch libraries be closed and the Provost's Decisions document concurred. I have discussed these findings with many in The Libraries, with both Provosts, and with the Deans of the Colleges these libraries serve. As a result of these discussions and the A2P2 recommendations, and within the context of moving resources into our priority areas, The Libraries will:

- Enter into a partnership with CAHNRS to explore changing the scope of the Fischer Agricultural Sciences Library. Planning for the space will begin soon, with some materials possibly moving to Owen in the future, but the facility will remain open. 0.5 FTE staff will be reassigned to another area and those additional resources will support other priorities.

- Reduce the scope of the Architecture Library. This library will remain open with additional funding from the School of Architecture and Construction Management. Resources made available by the partnership will be used to support other priorities.

- Reduce the size and scope of the Health Sciences Library, change its emphasis and rename it the Animal Health Library (AHL). 1.0 FTE staff will be reassigned to other priorities; the librarian will remain in the facility. The College of Veterinary Medicine will provide additional resources to support the AHL. Resources made available by the partnership will be used to support other priorities.

- Reduce the scope of the Brain Education Library. This library will remain open with additional funding from the College. 1.0 FTE staff will be reassigned to other priorities; the librarian will remain in the facility.

Obviously there are many items, some very formidable, that must be addressed in order to make these decisions a reality. Implementation planning will begin as soon as all negotiations with the affected colleges are completed.

Organization

The Libraries must become a flatter organization. The creation of working groups was recognition that our work crosses boundaries. That initiative needs to be enhanced by establishing a less complex and bureaucratic administrative structure. As our work changes or, more importantly as the world changes, our jobs have to change. This demands an organization that is flexible and fast moving and not layered in unnecessary hierarchy.

It is my intention to eliminate the two vacant Assistant Dean positions and reshape the current role of the AD for PSO. As part of that process the total number of units that make up our organization should be reduced (see later sections). The committee structure and working groups are effective and should be kept, but they should be reviewed.   In some cases, a committee may be doing work that could be more effectively done or coordinated by a single position.

It is important that communication improve in the organization. There are many ways that we could create mechanisms for consultation and advice. To start, I propose the creation of a Management Advisory Committee with membership including the unit heads, the chair of LFAC, and representatives from AP, classified staff, and the regional libraries. This committee will advise the Dean on policies and procedures.

Action Items

- Establish Management Advisory Committee
- Review all current committees and working groups
- Redefine the role of the ADPSO

Technical services

The Libraries' technical units are some of the most service oriented groups I have ever encountered in academic libraries. Obviously such an approach to the work is beneficial to everyone. However, it can sometimes be a problem when processing obligations accumulate until the units are paralyzed by growing tasks and almost nothing ever seems complete. We need to examine all of our technical processes and ask hard questions about their benefits and costs. In most academic libraries there are processes that were established to serve a useful purpose that have grown less important as the technologies and user behaviors have evolved and now crowd out the introduction of new work that would have a greater impact. Also, we should seriously review any local practice that makes conversion to new systems more complicated. We should not try and make up for the problems with our tools through manual labor.

More and more work in the library enterprise falls across unit lines. In many cases resources need to shift perpetually as workload diminishes or increases in certain areas. Expertise as well as effort needs to flow as well. It is in the nature of organizations for units to become solidified. All technical services workflow and organization should be periodically examined to see if there are best practices that we can adopt (again this speaks to the need for

professional development support). Each task should be measured against its ultimate service utility.

The areas in CTS should be reorganized to create a single dynamic unit under a single Head. In addition all of The Libraries' technical processes, such as MASC cataloging, should be coordinated in this unit. The collection development process should be removed to public services.

Action Items:

- Create a plan for the transformation of the Bibliographic Control, Serials/Electronic Resources and Acquisitions units into a single unit

Collections and scholarly communication

It is important to remember that we have acquired collections for the purpose of supporting research and learning at WSU. We should think of the collections as a service rather than as a material entity. Collections are not here for themselves; they are here to support the faculty and students working on behalf of WSU's mission.

If we look at the collections in this way it opens up a variety of new ways of thinking. For instance, this point of view makes it possible to think of moving resources from ownership to access. Investing in better access tools and methods, such as subsidizing ILL, is one such avenue. It is not enough to simply purchase materials: we need to make sure they are easy to discover and utilize. The tools and infrastructure are sometimes just as important as the content – an item that we own is useless if it can't be located by someone who wants it or who should be able to discover it.

Given the difficult budget times, and given the concept of the collections as a service rather than a capital investment, and given the difficulty we can continue to plan on in the false economy that is scholarly formal publishing, we should not be paralyzed by worries about the permanent collection. There is no question that libraries and publishers need to work out enormous and numerous issues– but the WSU Libraries cannot wait for a perfect tomorrow. We must serve our current students and faculty today.

If WSU is to participate in a new model for scholarly communication we need to make it a focus of the library faculty assignments. At WSU, we need to work harder than ever with the faculty to make them understand the realities of our concerns, and we need to develop programs of communication and action. We should work with the Colleges and the Graduate School on these plans and we need to put more support behind Research Exchange. Scholarly communication will change incrementally, and library faculty must work with WSU researchers constantly to make them aware of all appropriate issues and avenues for research exposure. We need to be frank with publishers about our concerns. In our professional lives,

in our societies, consortiums and organizations we should devote ourselves to scholarly communication issues.

The Libraries must continue the emphasis on digital collections. WSU is already a leader in the percentage of its budget that goes to digital materials. In most ARL rankings WSU hovers around the century mark, but in regard to digital collections, we are in the top 20. Much current research shows that many scholars from across all disciplines are much more likely to use digital products than print.

A point of discussion among many instruction librarians is what happens to our students when they leave the university with skills and abilities but a severely curtailed access to research material. We should address the lifelong use of resources for our graduates.

One aspect of the collections as a service is the provision of a delivery system. As the "long tail" concept indicates, people are interested in our print collections but are sometimes put off by barriers to access. So much information comes to our desktops that it seems too inconvenient and potentially unrewarding to seek out physical items. We should establish a pilot delivery system and examine its effect on the use of the print collection.

The Libraries must also examine its gift policies. Gifts are a valuable way to enhance the collection but they do not come without appreciable costs. We need to make sure the effort of reviewing, processing and housing gifts are matched by their usefulness as research materials and are equal to the services and processes that do not get support when it is diverted to gifts.

Action items

- Increase support for alternative access using Collection funds. The regional campuses will be included in planning and decisions for these areas. Possibilities include:
  - o No fee for ILL
  - o Pay per view access
  - o Delivery of physical items to offices
- Support changes in scholarly communication and create a WSU plan. Possibilities include:
  - o Absorb costs for faculty publishing in open access outlets
  - o Review faculty position descriptions to consider adding scholarly communication duties
  - o Expansion of Research Exchange
- Move the collection development function out of CTS (leaving acquisitions) and place it under the ADPSO
- The Scholarly Communication Librarian will work with the Head of Collections, the ADPSO and others to build a comprehensive plan for our scholarly communication efforts.
- Work with the WSU Press on open access issues
- Examine possibilities of alumni access to a core set of materials

- Write a comprehensive gift policy, and consider the formation of a major gifts committee to review the feasibility of large gifts before acquisition
- Convene a task force to explore our current practices of preservation of physical materials, including binding and mending operations.

Reference and liaison

Just as with technical services, the work in the units providing reference, collection development and liaison services overlap.   Here too the resources should ebb and flow as needs change and as opportunities arise. As the physical collections and physical reference desks become less visible and less frequently used, our functions and services are merging together on a variety of levels. Our website is our main branch, and it no longer serves us to operate so many individual functions. We can maintain our tradition of specialized service to disciplines while optimizing our efforts in providing reference in various platforms and in strengthening our liaison and outreach work. We need to examine all the assignments in public services as we examine emerging models and invent our own.   We should provide resources to help librarians maintain engagement with their faculty colleagues.

Given that we are in a time of change on campus, and with budget woes looming, it seems that the time is perfect for trying a new model. We are also faced with a unique opportunity to re-envision our branch libraries, to explore the "embedded librarian" model, and to take action on the future of reference. We must expand liaison duties and work with partners on campus. We have been successful in this area, but we need to redouble our efforts and become woven into the fabric of instruction and research.

Action Items
- Create an action plan for the transformation of reference services.
- Create a collaborative, sustainable model for liaison and outreach.
- Explore the inclusion of other librarians in liaison duties.

Instruction

The Libraries' instruction efforts, both within and outside the instruction unit, have been very successful and need to continue to be a high priority. As the information landscape becomes more complicated, both in size and complexity, the university's graduates will more and more need to be literate in seeking, evaluating and using information. WSU's recognition of the importance of these skills and the knowledge needed to employ them is evident in the inclusion of Information Literacy as one of the six Learning Goals for baccalaureate graduates. Librarians are uniquely qualified to support this goal.

Action Items

- Consider redeployment of personnel support to the Instruction unit
- Create a strategic plan for instruction that includes increased partnerships and even more use of suitable technologies
- Consider additional participation of librarians from other units
- Continue to work with campus partners as a high priority

Staff development

As other sections of this report indicate, we need to examine our deployment of personnel. We are an increasingly digital library and we need to make sure all of our resources reflect that fact. As jobs change, staff development, always a critical concern, becomes even more vital. As universities become leaner we need to make sure our systems support the people that must create our changing environments. It is vital that faculty stay engaged in our consortiums and organizations. It is absolutely essential that all of our personnel understand the larger context of their work. This is not just about training or travel. It is about everyone's participation in the larger discussions of modern libraries and in the decisions and directions of the Libraries.

Staff development also includes giving people the tools and environment for success. The Libraries needs to create an operating budget that supports the true needs of our employees even if that means we have 8 well-supported people instead of 10 frustrated ones without the means to accomplish their objectives. We must be careful before reallocating the resources associated with open positions.

Some of our objectives can be achieved by a commitment to cross-training and the support of internal movement of personnel from department to department. New challenges are essential if individuals are going to maintain a healthy approach to the workplace. We must be open at all levels, including faculty, to regular redistribution of duties and to the expansion of responsibilities. We should examine basic duty modules and see if they can be put together in creative ways.

As libraries have become more complex, as the amount of clerical and rote tasks have diminished, the positions in the library have demanded higher skills and the ability to imagine new ways of achieving ends. We need to recognize this reality by being creative with our personnel practices. Positions will continue to become more professional and technical, and we need to provide the training and compensation.

Action Items

- Increase the resources for training and staff development.

- Examine the policies for job sharing, cross training, mentoring for all personnel, etc.
- Continue to assess the mix of faculty, AP and staff positions.
- Examine the practicality of non-MLS faculty positions, e.g., in technology areas
- Prepare annual system-wide staff development plans.
- Reexamine faculty assignments to see if they can accommodate cross assignments.

Funding

All organizations need funding, and difficult economic times make the future difficult for everyone. Libraries have a more difficult time dealing with steady or declining funding because of the continuously spiraling cost of materials. This is especially true in STEM fields but it is foolish to think the Social Sciences and Humanities have been immune from the toll of what appears to be unwarranted price increases. In the short term the library administration must continue to work with the university administration to develop a method for sustaining our ability to purchase materials at least at a constant level. There are many methods employed in ARL libraries to help libraries keep up with the rate of inflation and they should all be explored. This should be a high priority.

The Libraries must also use the funds it does have has as efficiently and effectively as possible. Much of this planning process has been devoted to exploring the use of our resources.

Another way to increase financial resources is through fund raising. Indeed, success in this area is often doubly rewarded as it is one more demonstration of our importance to the university community. Priorities in this area should include technology, space and collections – particularly our digital activities. As the digital world grows, the importance of special collections clearly increases - as does a library's responsibility to collect, manage and expose original collections. As journal literature continues to corrode the library's ability to collect monographs, book endowments are a logical solution.

The Library Administration must also put a high priority on fund-raising. The dean should spend a good percentage of time on the endeavor. The effort should also include the assistance of other librarians. As we build our appeals we must excite donors. Donors do not just want to hear from administrators and development officers. They want to meet our faculty and hear about our programs first hand from librarians who are engaged in exciting projects and working directly with students and faculty. The Dean and DOD must make every effort to expose library faculty and staff to donors.

To be successful in this effort we need to have a focused message and well-defined requests. Wherever possible, the library must be flexible in accommodating the desires of donors.

A third way to increase funding is through grants. So far we have been successful on an opportunistic basis but we must develop a strategic approach to grant-seeking. Grants are a difficult avenue since oftentimes great effort goes unrewarded. We need to provide support

in the library for this effort. This means that The Libraries should establish a small and responsive group, or designate an individual, to coordinate and shepherd our grant process from planning through execution.

Action Items

- Dean should continue efforts with the university to address material budget needs
- Hire a Director of Development
- Create a development plan
- Increase Dean's time devoted to fund raising
- Institute a central grant seeking and administration facility, either as a personnel assignment or a small team.

Space

With the modification and closing of the branches there are new space needs to assess. Some concerns are short term while some are well into the future. There is an obvious need for a new overall space plan. Library space needs to be used creatively.   Library materials are increasingly digital and are used in digital research and in digital presentations. Students need to have space and equipment to work on these projects and they need spaces that accommodate their mandatory (and increasing) group work.

A new space plan must address:
- Long term storage needs
- New technologies
- New research and production methods
- New learning methods and instructional trends
- Short term improvements (we really do need to buy some chairs for the New Book Room in Holland and Terrell, for example!)
- Orbis Cascade planning for regional storage facilities and cooperative collection development

Action Items

- Establish a facilities planning task force to review current plans and needs and make recommendations

Technology

Technology services are at the heart of our current and future endeavors. The Systems unit is the ultimate example of work flowing across departmental lines; they are involved in every corner of our operation and we need to make sure they have the skills and resources to complete their assignments.

There are a number of keys to our success in technology, including

- The systems unit should grow and we need to enhance the technical skills in all library personnel.
- We must continue to examine next generation, network-based systems and be prepared to move to new platforms.
- We must create an operating budget that supports steady equipment replacement.
- We need to develop local tools only when they can not be readily acquired from a vendor.
- Open source solutions and standards should be a priority when it is feasible.
- We should look seriously at grant opportunities and development support if we are to participate in the creation of tools.

The future of library automation is at a network level; any problem that is better solved at a higher level should be solved there. Besides eliminating duplication of effort and allowing all of us to benefit from advances made possible by group resources, such a direction frees up local resources to tackle truly local matters.

Action Items

- The Libraries should provide more resources and personnel to technology efforts. A review of the current assignments should precede any adjustments.
- We should continue to look at next generation systems including:
  - The core integrated library system
  - The usefulness of Google Scholar and other universal services and their incorporation in our main set of services
- The creation of a digital services team that examines better ways to
  - Create products such digital versions of special and archival material
  - The provision of tools for researchers such as EndNote
  - Incorporation of digital services into current operations
  - The creation of new digital tools
- Increase the cooperation with other campus technology units
- Establish a technology replacement budget
- Establish best practices for digital collections-related project management
- Create a Technology Plan

Marketing

We must make marketing a priority. We need consistent, current messages and we must produce news on a systematic basis. Our constituents need to be more aware of our services, our strengths and our needs. We do good work, indispensable work – and too often we do not get credit for it. We need to tell our story more credibly in order to enhance our internal and external development.

Marketing activities are presently diffuse in the organization. Many people have done a good job providing our essential needs in this area in the absence of a plan and organizing principles. The Libraries are in great need of carefully crafted internal and external communication plans. Such plans should have clear objectives and to do them well, it is necessary to have professional direction. The Libraries should consider obtaining professional help for the endeavor. We need more than a web site designer (although we should also look at a part time position or consultant for that area). A marketing plan is a difficult undertaking and requires an in-depth discussion with our constituents.

Action Items

- Decide how resources will be devoted to marketing.
- Consider hiring a part time or consulting marketing professional
- Create a marketing plan

Consortia

We must continue and expand our work with consortia. If library values are to prosper in universities then libraries must work together on increasingly fundamental issues. We must work with our partners in ARL, GWLA, Orbis Cascade, ICCL, OCLC and others to ensure we maintain a voice in scholarly communication and information seeking.

Assessment

The Assessment Working Group is an effective entity but we must make sure it has the resources to do the important work assigned to it. Our assessment effort should be reviewed with the intention of making it even more integral to our operation. A Task Force should examine the resources currently devoted to data collection and assessment and make recommendations for the future of the program.

Action items

- Create a task force to review our efforts at assessment and data collection, making recommendations to elevate its importance and create a culture of assessment

Budgeting

These changes will, barring budget cuts, create some operational funds. It would be a mistake to use them for permanent obligations. The funds should be used to support needs that arise and can be dealt with using short-term projects or a one time purchase. It is important that our organization has an operational fund that allows us to take advantage of special opportunities or fix resolvable problems - one year it may be that we need help in cleaning up records and another year it could be digitizing collections or replacing furniture.

Although we will fill some empty positions as this process continues, we must be careful not to commit ourselves to permanent positions or obligations that completely eliminate flexibility in our operating budget. Likewise we should continue to scrutinize any new openings to make sure our financial and human resources are devoted to our highest priorities.