

SYSTEMWIDE LIBRARY AND SCHOLARLY INFORMATION ADVISORY COMMITTEE
LIBRARY PLANNING TASK FORCE

Initial Meeting, October 4, 2010
9 a.m. - Noon

MEETING NOTES

Attending: Lucas (chair)(audio); Cogswell (audio); Doyle; Greenstein (audio); Miller; Schneider (audio); Schottlaender; Waters; Wolpert
Absent: Meyer
Support: Farley (consultant), Lawrence (staff)

1. Introduction of Task Force members (All) (15 min)

Background: Task Force roster

2. Review of the Task Force charge (Lucas) (30 min)

Background: Task Force charge

In the course of the discussion, Wolpert raised questions related to campus academic differences and aspirations, and the relationship (if any) between library planning and academic planning. Greenstein emphasized that the tension between operating at scale and remaining responsive to local campus concerns and issues is a fundamental issue for this group, and observed that one perspective on our work is to let the campuses know what collections, services and investments will be supported systemwide so that they can more reliably plan their local strategies and investments.

Cogswell remarked that space for library collections, particularly in the Regional Library Facilities (RLFs), is a critical issue that needs to be fully explored by the Task Force. Schottlaender concurred, noting that from his perspective, the problem is less with accommodating growing collections than with the fact that the campus print collection is actually shrinking faster than expected, leading to pressures and opportunities both to repurpose library space for other kinds of library service and to return space to the campus for non-library uses (it was noted that both UCLA and UCSF have lost existing library space to other academic functions; in both cases, these decisions represented opportunities to engage campus communities in productive discussions about redefining library functions).

3. Discussion of Key Issues and Strategies (Greenstein, Miller, Lawrence) (1 hour)

Background: "Background Materials for Task Force Discussion," with 5 attachments

Greenstein began by setting out his view of the key issues in the three areas of collections, services, and organization/funding.

- In collections, (1) there is more information being produced than we can afford to acquire (this has been true for many years, but the gap continues to grow), (2) space to accommodate additional print materials is inadequate, and (3) new forms of (especially digital) information are becoming academically important. How should collection development and management investments be prioritized? Where can we find efficiencies? What kinds of materials should be collected at what levels (e.g., campus, systemwide, nationally....)?

- In services, we can assume that even if we spent every penny of the library budget on collections, we would be unable to acquire everything relevant to UC's diverse academic program. Taken to the extreme, a focus on collections leaves nothing for the wide range of services that libraries provide. What are UC's priorities for library services, and at what organizational levels should services be provided, funded, and managed? To the extent that funding of services is seen as competing with the development of comprehensive collections, what priority should be given to emerging services such as curation of digital assets or support for new modes of scholarly communication?
- In organization and funding, the trend in the economy in general, and the natural tendency of digital services, is to seek increasing scale of operations. What is the ideal scale for UC's library operations and services? Is UC-wide a sufficiently large scale? How do we achieve and sustain large-scale services when funding is distributed and allocation decisions decentralized?

In response to a question from Lucas, the University Librarian members confirmed that these three areas comprehended their understanding of the major issues confronting the libraries.

Among the points raised in the discussion of **collections** were:

- Modes of scholarly communication are changing, and faculty will (often one-by-one) lead the changes, often without library intervention or investment; what, then, is the role of libraries in supporting new forms of scholarly communication and fostering change? Which is more important, acquiring published work or helping to manage and disseminate our faculty's products? How do these issues differ by discipline?
- The choices are not starkly drawn, e.g. print vs. digital or local convenience vs. non-duplication, but exist on a variety of continua, e.g. avoiding unnecessary duplication, exploring the options with respect to the 3 million print items in UC collections that have been digitized, exploiting changes in modes of information distribution without abandoning access to the underlying information.

In summarizing the discussion, Greenstein suggested that the TF proceed by examining a number of staff-developed scenarios that would both illustrate and dramatize the options and their high stakes, and provide a concrete foundation for TF discussion. The TF concurred on this approach and on a 5-7 year planning time frame for scenario development. It was further agreed that the scenario projections would initially hold budgets and space allocations constant and incorporate provisions to account for the effects of (a) price inflation in library materials and (b) the budgetary savings needed to fund the retirement system, which are expected to have a combined net effect of about a 10% annual reduction in the buying power of library budgets. Factors to be considered in development and discussion of scenarios include:

- Clarifying the separate effects on retention (i.e. existing or "legacy" collections) and acquisitions (new purchases/licenses).
- Differences between general (ubiquitous) and special (unique) collections; it was agreed that "new forms" of research collections (especially research datasets) could and should be considered "special collections" in this dichotomy.
- The different effects of renting (licensing) and buying.
- The net impact (on space, cost, breadth) of prioritizing collection breadth over (necessary/unnecessary) duplication or space savings.
- The net impact of prioritizing space savings (e.g., by eliminating redundancy between campuses and among formats, elevating digital as the preferred format in all cases, aggressively weeding campus and/or RLF collections, etc.)
- Sources and strategies for alternative revenue sources to support collections, and opportunities for (and effects of) reallocation of existing budgeted library funds.
- Alternative strategies for collection housing, including increased use of compact storage on campus, use of external facilities (e.g., WEST), etc.

Among the points raised in the discussion of **services** were:

- Where campus libraries duplicate effort in the development and deployment of services, can these be centralized? Is there a role for systemwide promulgation and adoption of best practices, applications, etc., developed by one or a group of campus libraries in order to avoid unnecessary duplication of effort?
- As the nature of collections and discovery services changes on a disciplinary basis, are there opportunities and needs both to develop new tools and services and to foster and accelerate these transformative research practices? If so, and given the distributed nature of both the research communities involved and the research collections and tools they create and use, what is the collective role of the UC libraries, if any, with respect to these services?
- To the extent that campus libraries are forced to choose between supporting “commodity” services used by large numbers and unique services that would have a high payoff for specialized campus communities, does the requirement to support the commodity services diminish the creation, deployment and promulgation of services for specific communities? Can the commodity services be identified and scaled up in order to release resources for better support of specialized academic communities?
- While there are important differences in the characteristics of user-facing and “back room” (i.e., technical and administrative) services, both should be included in the TF’s considerations; however, the University Librarians have launched a large-scale study of technical service options (the results of which will be available to the TF during the term of its appointment), so the group might more profitably given its initial attention to user-facing services.

In summarizing this discussion, Greenstein suggested that the TF examine scenarios that (1) explore scale effects (looking to the University Librarians to summarize and expand on current planning activities as a point of departure) and (2) articulate approaches to exploiting developments in disciplines that are (a) rapidly developing new practices and uses of information collections, and/or (b) nationally pre-eminent at UC campuses. Waters suggested that in this scenario development, the TF adopt the principle of supporting innovations that contribute to the economy of the system, and the TF accepted that an important part of the process would be developing specific goals and targets for service development (a net saving of \$15-20 million per year across all services was suggested as one possible target).

With respect to **organization and budget**, Greenstein suggested that further identification of issues and development of criteria for scenarios should be informed by the outcomes of discussions about collections and services.

4. Building the Task Force agenda (Lucas) (30 min)

It was agreed that (a) the TF would plan to meet by phone and desktop video approximately every two weeks for 90 minutes, (b) each meeting would be devoted to some aspect of the three broad issue areas and informed by materials to be developed by staff, (c) the next two meetings (at minimum) would be devoted to collections, followed by two (or more if necessary) meetings focused on services.

5. Next steps (Lucas) (15 min)

As Miller and Schottlaender are not available on October 18 (the next tentatively scheduled meeting date), that meeting is cancelled. The next scheduled meeting of the TF will be on **November 1, 2010, from 8:30 -10 am (PDT)**. Staff will poll the TF for a suitable time during the week of November 15. Additional dates currently tentatively scheduled are:

November 29, 10:30-12 (PST)

December 13, 11-12 (PST)